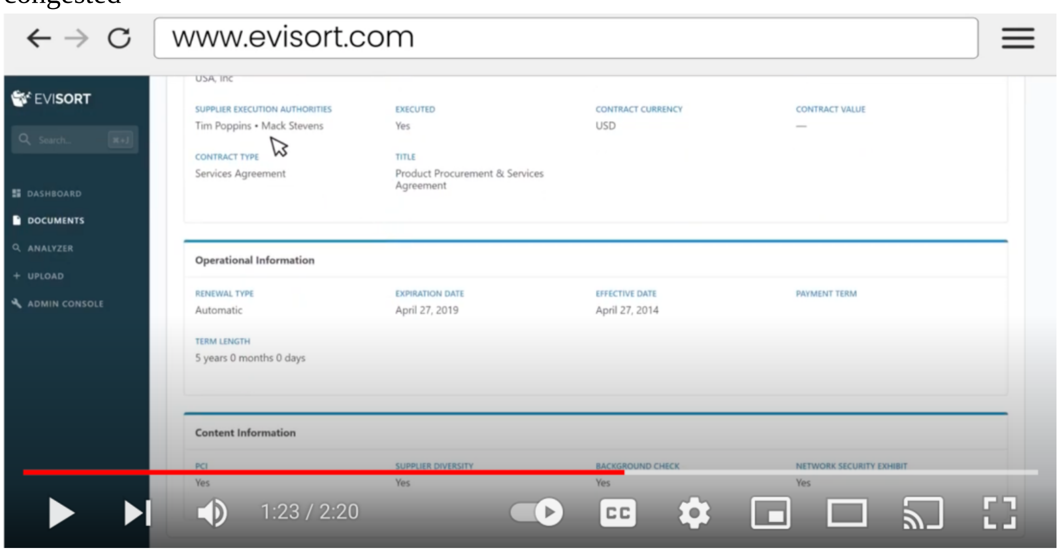
Phase 2.1 - Software Development

Overall Guideline

- Company Fonts: Arial
- Company Colors:
  - **Orange -** #F58400 as an anchor orange but we can use different shades of orange especially in the data visualization parts or to create better contrasts.
  - **Gray -** #555555 as an anchor gray but we can also use ranges of gray per above
  - **White**
  - **Black**
- Company Logo

DEI Directive
For Data-Driven Action

- **Gathering Cookies -** so we can learn how the users are using our platform, etc.
- **Feedback Or Product Requests -** button at the bottom of every page asking customers to enter their requests.
- **Overall feel of the website -** clean, slick, simple, user friendly. Model the overall feel of this website (www.evisort.com)...but make it a bit more lively and colorful (this will probably happen given our company colors). We can also take inspiration from www.hubspot.com but keep it less congested

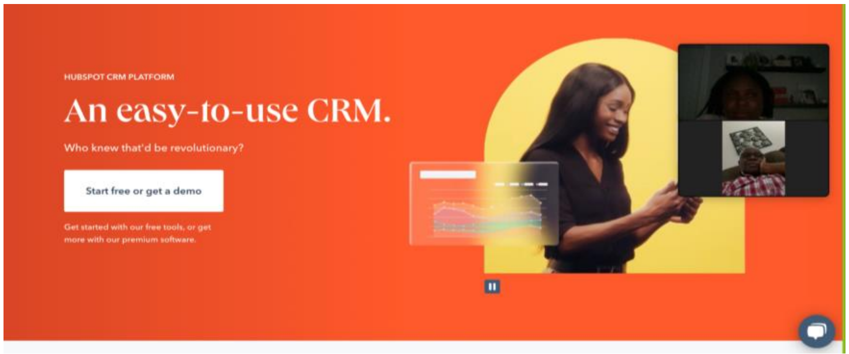


User Journey/Steps

The user journey will depend on what stage the relationship is at.

1) **Initial Inquiry Stage -** customers that haven't interacted with personnel from DEI Directive and are interested in learning more and potentially exploring our software as a solution for their organization

   These customers are able to play with very basic functionality (***we will need to design what this inquiry page will look like, below***), with call to action to schedule consultation (calendly link of consultant). Prompt page should be similar to Hubspot screenshot below:



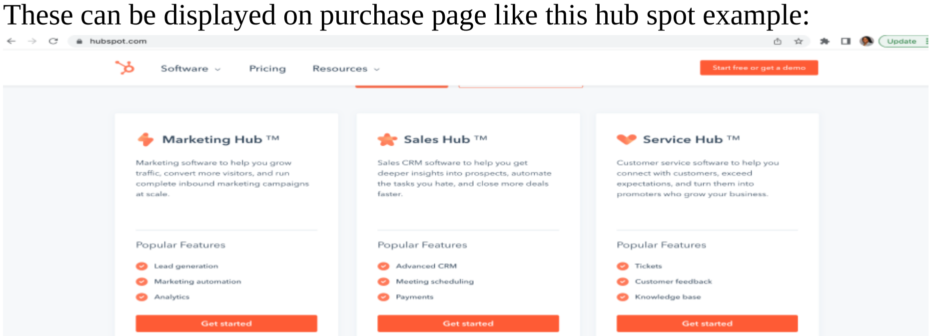
   To do this, they will also need to provide the following information:

   1) **Sign up -** to do this, they will provide the following information:
      a) First Name
      b) Last Name
      c) Company Name
      d) Job Title
      e) Email Address (Will get email confirmation to activate account)
      f) Phone Number

There are essentially 3 tiers of products customers can purchase:

1) **DEI Directive Premier -** access to everything [DEI Analytics - (Reporting, Benchmarking, Progress Assessment), Learning Modules, Compliance]
2) **DEI Directive Analytics -** everything except the learning modules
3) **DEI Directive Learn -** Learning Modules Only

These can be displayed on purchase page like this hub spot example:



After consultation, if they want to purchase - then a software agreement is signed and they can log in for full access.

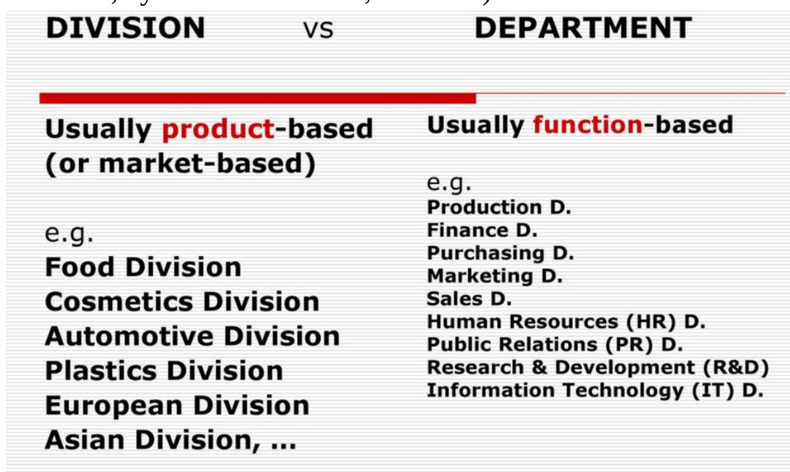
2) **Leads Stage -** customers that have already spoken with DEI Directive consultant and are looking to move forward with our software. Once a customer has signed our software agreement, they can begin interaction with our software.

<u>PAID CUSTOMER</u>: A customer's first step as an official paid user of the platform will be to:

1) **Log in -** as user logs in, prompts pop up chronologically
   a) **User Profile Set Up**:
      i) First Name
      ii) Last Name
      iii) Company Name
      iv) Job Title
      v) Email Address
         - Will get email confirmation to activate account)
         - Will need two factor authentication each time they log in
      vi) Phone Number
   b) **Administrative Entries:**
      i) Credit Card information - for auto pay? We should aim to have this on file. Ensure security protocols are followed. Integration with Stripe? What other security prototype needs to be in place?
      ii) Alternate Contact Person (First Name, Second Name, Job Title, Email, Phone Number)
   c) **Technology Insight Gathering**:
      i) What Human Resource system are you using
      ii) What ERP system are you using (Build a connection [strategic partners] with Dynamics - a microsoft product), or SAP (from oracle)
      iii) What API system does the organization use
         - Data we can pull from API (individual level information not stored in our system, data pulled - encrypted during pull, aggregated and deleted from our system)
            (a) Employee's name
            (b) Date of birth/Age
            (c) Start date (at the organization and also start date for each role at the organization)
            (d) End date (at the organization and also end date for each role at the organization)
            (e) Gender (male, female, transgender, non-binary/non-conforming, none of the above, prefer not to answer)
            (f) Race & ethnicity (White, Black/African American, Asian, Hispanic/Latino, Native Hawaiian/Pacific Islander, American Indian/Native Alaskan, Two/More Races, Other)
            (g) LGBTQ+ (lesbian, gay, bisexual, transgender, queer)
            (h) Re-entry candidates (misdemeanor, felony)
            (i) Disability (use these categories):

(i) **Physical**
(ii) **Mental-developmental** eg. *Autism, Down Syndrome*
(iii) **Mental-behavioral/Mental-emotional** eg. *ADD, Bipolarized*
(iv) **Sensory impaired disorders** eg. *Deaf, Blind or Visually Impaired*

(j) Religion (Christianity, Judaism, Hinduism, Buddhism, Islam, Atheist, Agnostic, Sikhism, Mormon, Unaffliliated and Other)
(k) Veteran (Yes, No)
(l) Citizenship (US citizen, Immigrant-first generation)
(m) Level at the organization (Executive leadership, Senior leadership, Manager level leadership, individual contributor)
(n) Job Function at the organization (by Departments, by Division-Location, by Division-Product, Job Role)



(o) Income/Pay
(p) Pay Scale - range for each job level
(q) Marital Status (married, widowed, divorced, single)
(r) Parental status (single parent, biological parent, step-parent, adoptive parent, guardian, foster parent or custodian of a minor)
(s) Geographic Location
(t) Education Background - High School, Postsecondary-Certificates, Postsecondary-Diplomas, Associate Degree, Bachelor Degree, Master Degree, Doctorate Degree and PostDoctorate Degree, Adult Education, Continuing Education, and Special Education
  (i) Include Year Educational Accolade/Degree was earned

u) Job Level (Individual Contributor, Team Lead, Manager, Director Executive
v) Union Affiliation
w) Job Function/Division (Marketing, Sales, Finance etc)

2) Learning/Platform navigation videos
3) Chatbox for assistance
4) Workgroups - chat rooms - where users can network and exchange ideas with each other

5) Prompt for pre-scheduled weekly office hours

6) User Types - different user types (admin, manager, individual contributor)

a) Admin user should have the ultimate access to:

iv) Add, Delete and Edit User Profiles

v) To customize default user interface for the organization

vi) To emulate different users at the organization

vii) To create and edit goals of the organization

viii) To create survey Qs, send and project manage surveys

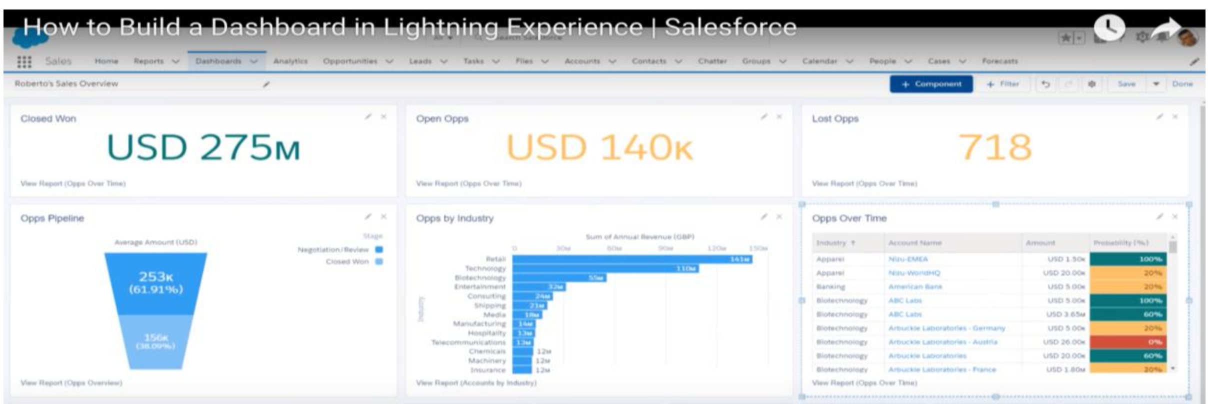
b) Admin User capabilities for learning features

ix) admin to assign and customize and project manage, manager-level user, end user -given assignment

c) External User - user type that allows our clients to be able to share some information with their clients (for the fields they determine)

**Once logged in, the default page should be the Dashboard. This page should have:

- The company logo displayed at the top left of the page
- User Profile at the top right
- Settings button at the top right
- Onboarding and Software Navigation/Training videos at the top right
- All the core features of the software displayed at the top of the page (from left to right), much like how the salesforce screenshots below. Those core features are (Dashboard, Employee Analytics, Hiring, Benchmarking, Reporting, Compliance, Learning):

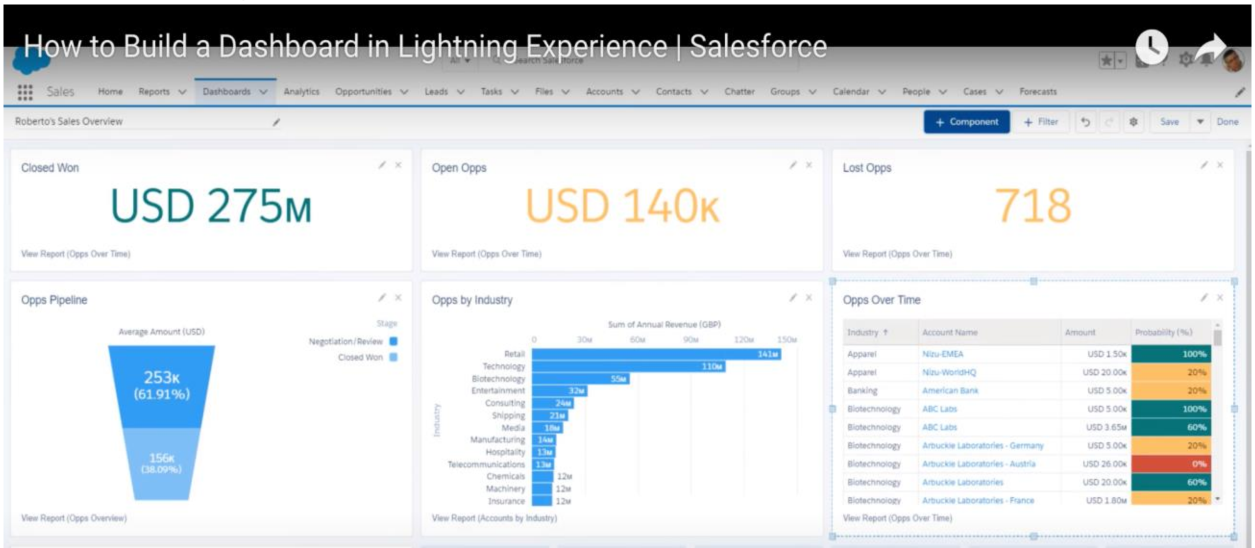


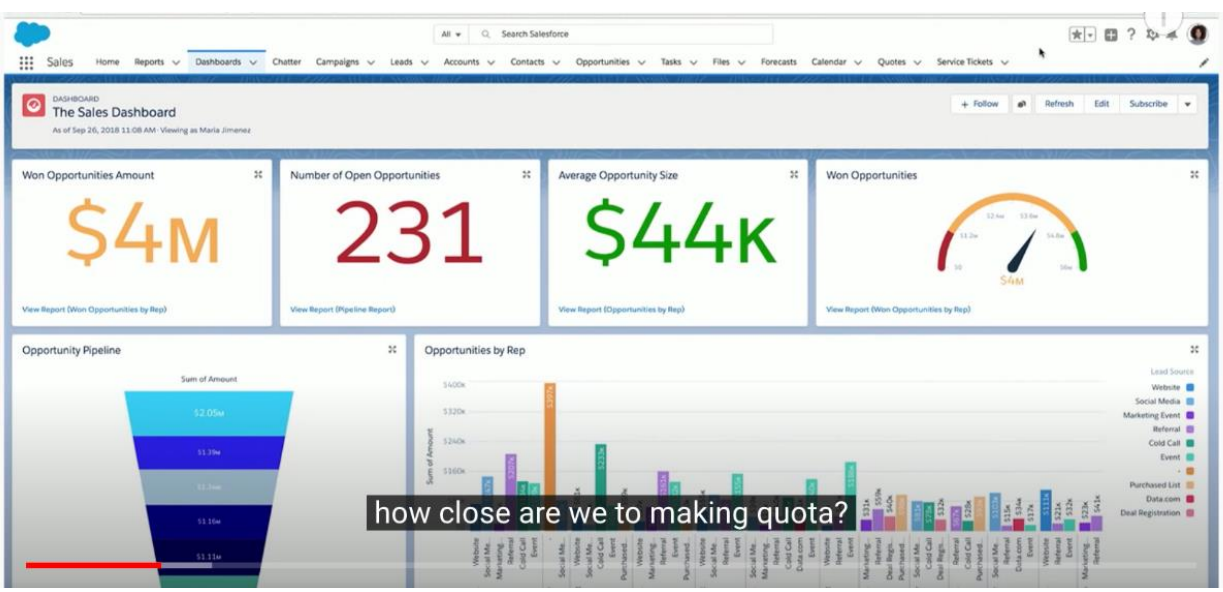
Features:

- **Dashboard (Company level data - not visible to other organizations) -** Quick display of data that convey overall DEI Health of organization. The detailed play by play information will be under reporting. Dashboard tags "View More" can also route users to selected widget within the Reporting tab. Our dashboard will help users monitor what is going on easily.
  - Big picture of status quo at the organization
    - Organization demographic breakdown
      - With option to "view more" and see how this breaks down by hierarchy, job function etc"
    - Team demographic breakdown

- With option to "view more" and see how this breaks down by hierarchy, job function etc"
- Score (team level vs organization level) - green/yellow/red
- Goal they have set (default is US demographic breakdown - with an option to add their own customized goals)
- Progress bar - showing progress against customized goal or us demographic if customized goals haven't been created
- Tips - action items that can advance goal

**Here are great sample screenshots:





- **Benchmarking** (public DEI information for companies and information that may not be public but have been voluntarily disclosed by clients). This is largely a display of what is in the prototype but much more comprehensive feature-wise. The benchmarking piece however, will

move to the top with the other filter options at the bottom half of the page. This information will also be more big picture data detail (so essentially the information that is captured in the EEO-1 reports.
  - Benchmark against US census data
  - Benchmark against external qualified population data
  - Benchmark against internal qualified population data
- **Reporting -** provides users with a more detailed collection of tables, charts, and graphs which they can then use for a much more detailed, full analysis.
- **Recruiting & Hiring Reporting Features** (all the demographic info we collect for employees BUT for prospective candidates)
  - How are candidates identified - referrals, solicitation, website, social media, job sites etc
- **Customizable Survey function -** to create customized questions (up to 200 Qs), and send out to different participants, and collect results, which can be presented with great visuals. Our very own Survey Monkey.

Phase 2.2 - Software Development

- Admin
  - Assign User types
  - Customization
    - Of page layout (columns etc)
    - Graph display options
  - Project Management features
    - Assigning learning modules to learners
    - Deadline to enter team data
    - Action prompts
    - Goal confirmation prompts
  - Surveys - To create survey Qs, send and project manage surveys
  - Subscription Upgrade & Renewal
  - API Plug-in
  - Invoicing page
- Export Functionality
  - Print, Email, Download
- Organization Scoring
  - Green, Yellow, Red
- Ability for clients and users to give feedback and suggest features updates and improvements - link at the bottom of every page
- Compliance
  - ways to pull mandatory reporting data from customer's API
  - Way to facilitate collaboration among teams to ease process
  - Realtime update of data
- Learning
  - Lots of learning modules which can be turned on and turned off at different levels for different clients

    - Admin can send learning module assignments with start and end date and be able to send reminders to asginees
- App development for software

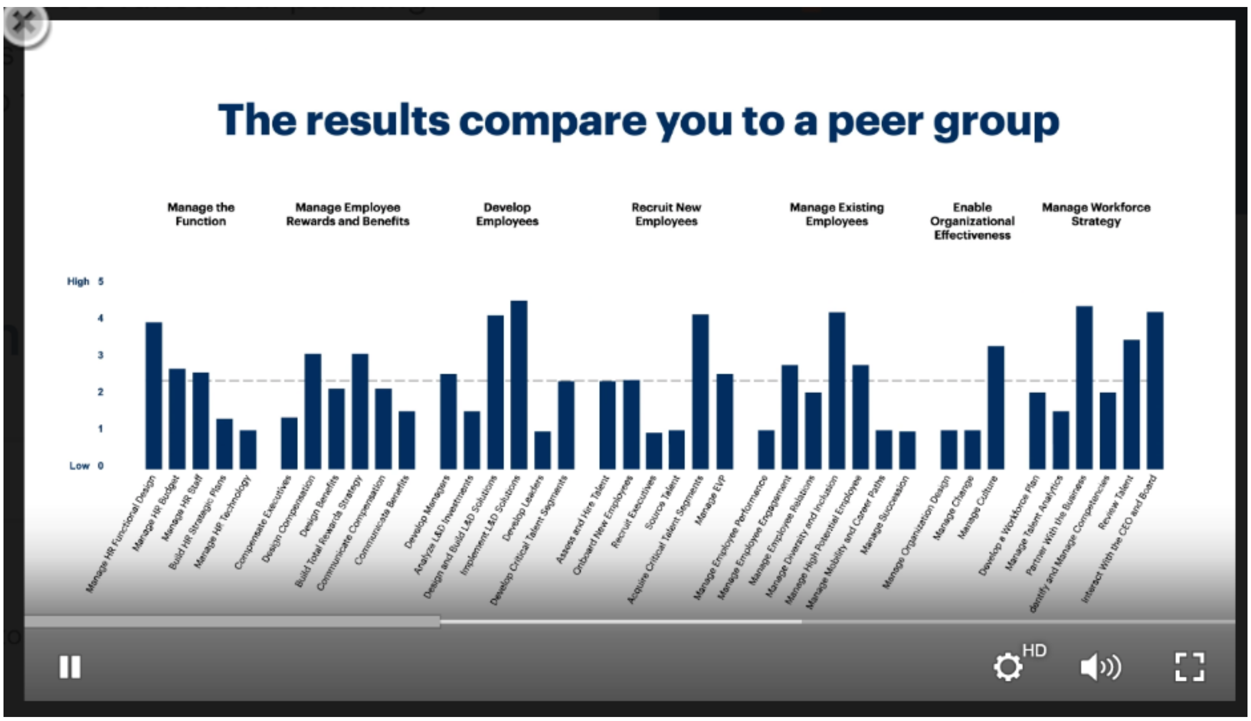
Competitor Websites to look at:

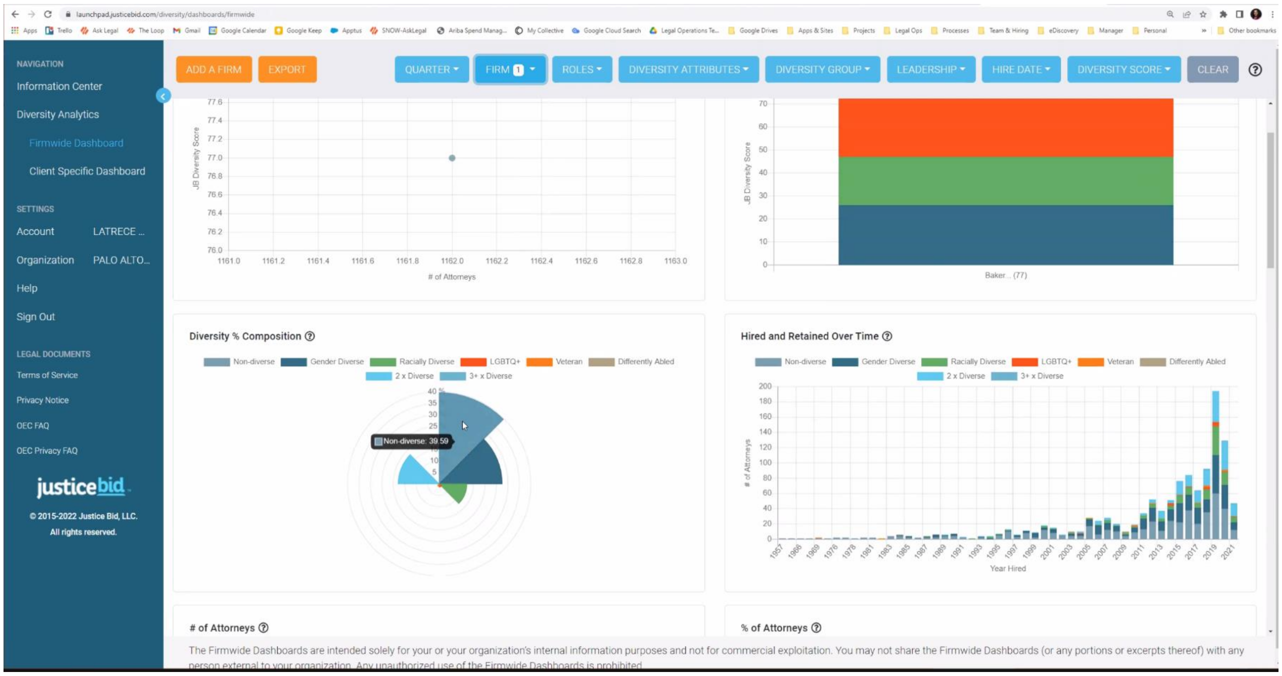
Salesforce: for overall
Justice Bid: https://www.justicebid.com/ - analytics content most similar to what we're building
DiversityInc: https://www.diversityinc.com/facts-figures/
Engagement Calculator: https://www.engagementmultiplier.com/roi-calculator/

- https://www.engagementmultiplier.com/features/benchmark-assessment/

Pipeline Equity: https://www.pipelineequity.com/
Workday: https://www.workday.com/en-us/solutions/role/enterprise-hr/diversity-inclusion-belonging-solutions.html
Gartner: https://www.gartner.com/en/human-resources/research/benchmarking
Kanary's: https://www.kanarys.com/

Helpful screenshots demonstrative:

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Racially Diverse
LGBTQ+
Veteran
Differently Abled
2 x Diverse
3+ x Diverse
Non-diverse: 39.59
Hired and Retained Over Time
Year Hired
# of Attorneys
% of Attorneys
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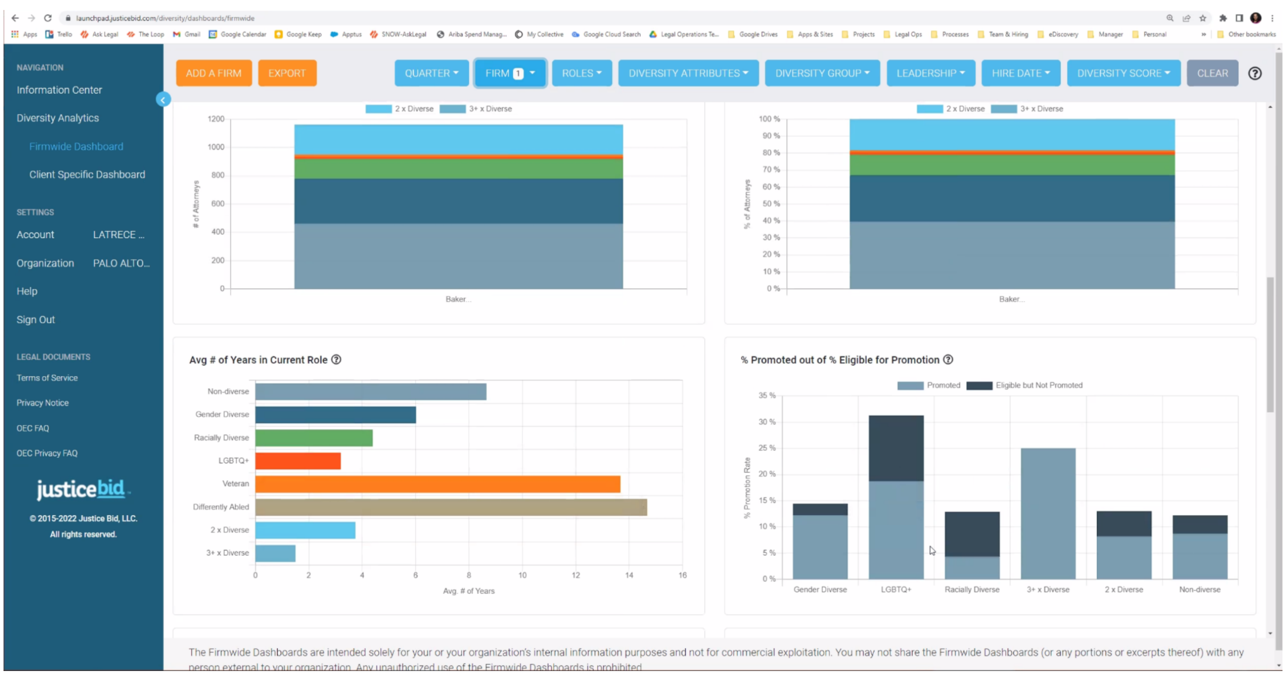
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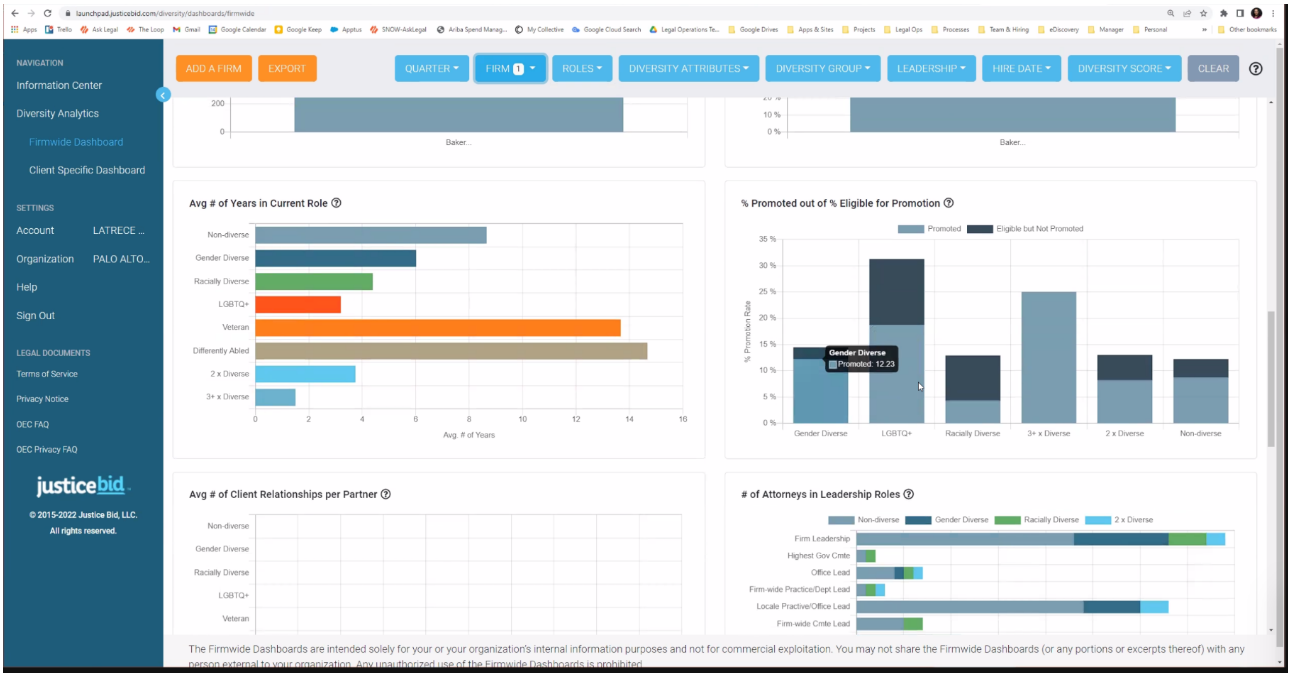
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Differently Abled
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3+ x Diverse
Avg. # of Years
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Gender Diverse
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LGBTQ+
Racially Diverse
3+ x Diverse
2 x Diverse
Non-diverse
Avg # of Client Relationships per Partner
# of Attorneys in Leadership Roles
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Office Lead
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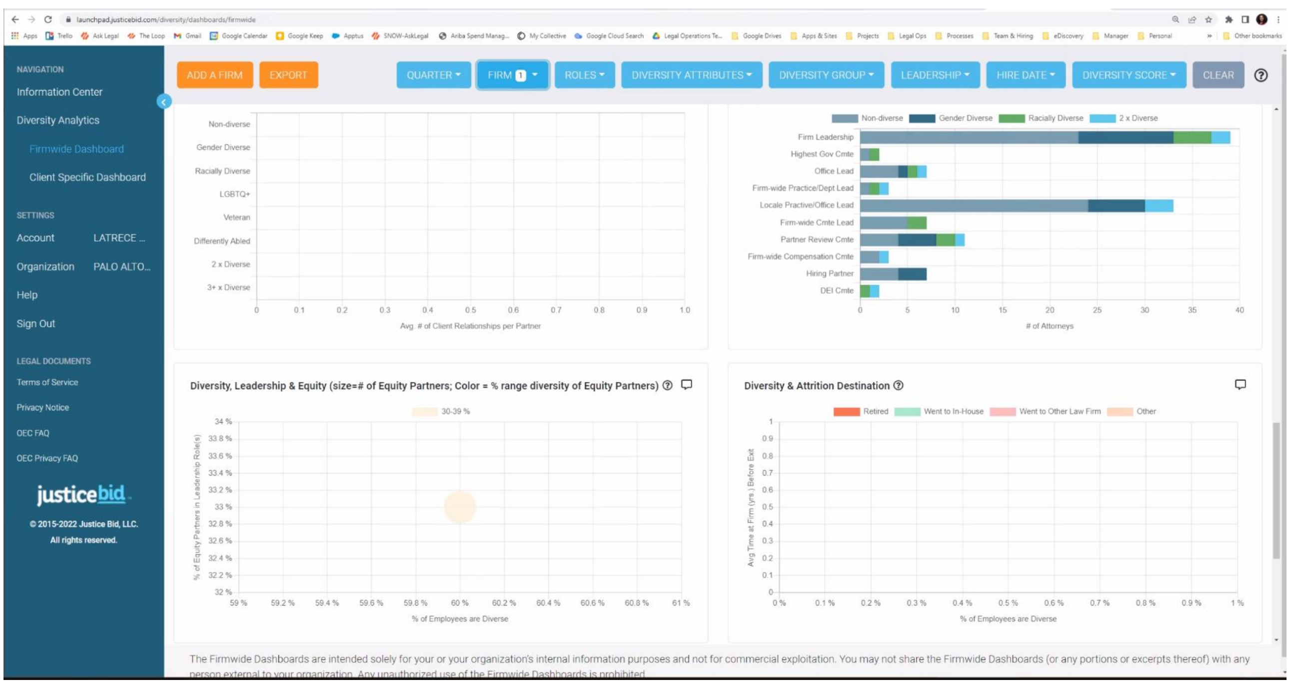
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Firm-wide Cmte Lead
Partner Review Cmte
Firm-wide Compensation Cmte
Hiring Partner
DEI Cmte
# of Attorneys
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% of Employees are Diverse
Diversity & Attrition Destination
Retired
Went to In-House
Went to Other Law Firm
Other
Avg Time at Firm (yrs.) Before Exit
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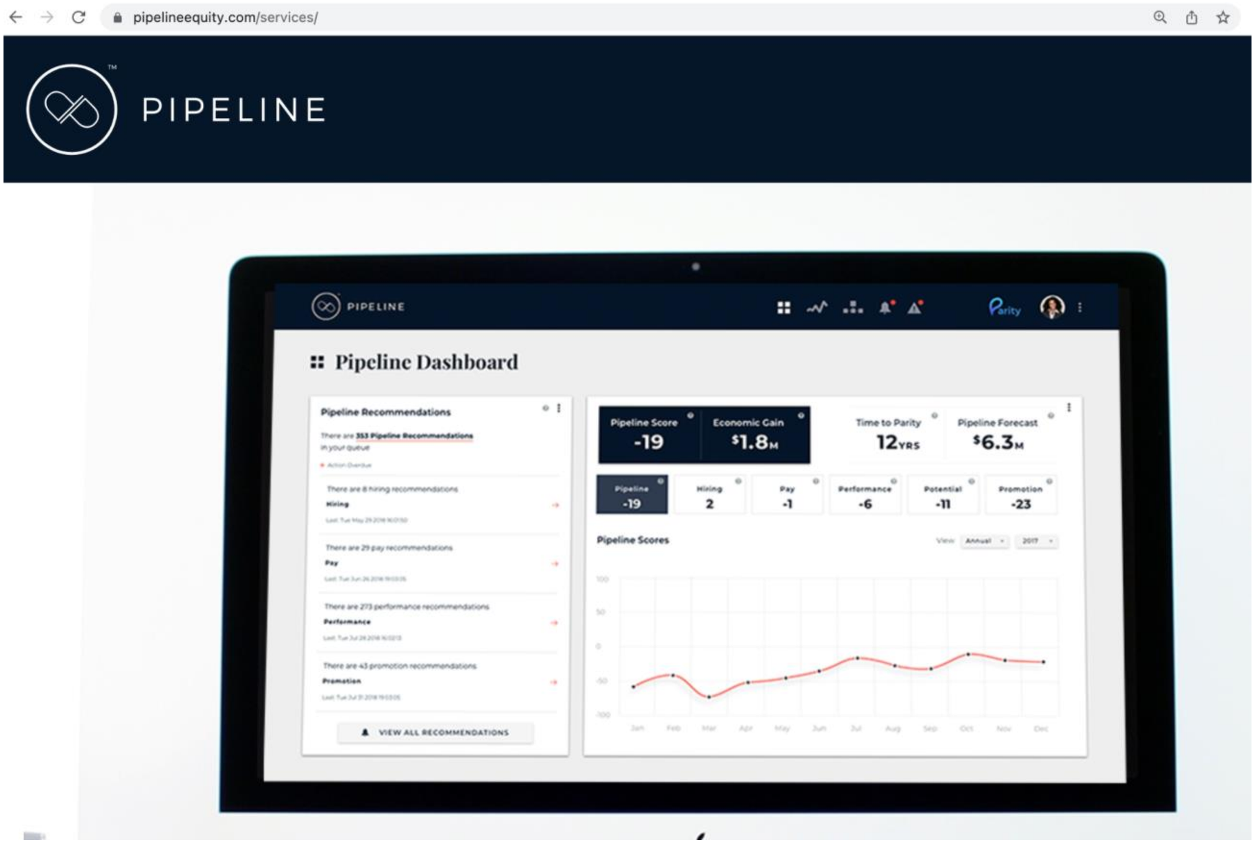

<u>Overall Goal of Software:</u>

Our system helps users quickly access DEI information in realtime and allows them to comfortably assess and dissect that information in many varied ways so they have a deep understanding of their organization's DEI health overall, as it relates to specific functions, levels, areas of the business, and in so doing, helps them identify what is working, what isn't working, and what needs to change, as well as devise a plan to get from point A to Z.

Users can dissect DEI data in our system as follows -

Demographics - demographics by location, division, department, manager, job level, job function and reporting lines. In doing this, users can ask these questions: Where are teams mostly homogeneous? Where is there diversity? Are there patterns you can detect immediately, or do you need to dig into additional data?

Tenure & Turnover - Check your turnover demographics by all the categories you can (by demographic, by gender, by division, department, manager, location, job function, reporting lines etc). Look for example, for patterns by location and manager. When you see higher than normal turnover, see if there are specific concerns in one area or are there overall culture issues? Turnover is another metric where benchmarks can offer insights about how you are doing compared to other organizations. But even if your industry or location is having similar experiences with turnover, determine the reasons and don't assume you are doing the best you can.

Reasons for leaving the organization - Determine why people leave, both overall and in the places you see potential struggles with diversity. How is the reason for leaving gathered (entered by the manager, entered by the departing employee, through exit interviews, etc.). Great data that can highlight an area where you may have a manager or location that is causing people to leave.

Career Pathing and Time to promotion - It is essential to understand whether employees see opportunities to move up in the organization, have access to management and skills training programs, and whether there are career paths open to everyone. A key to improving diversity, equity and inclusion is to ensure everyone is considered for promotion no matter who they are if they are capable of taking on the next opportunity. Another important metric to watch is how long employees are in their roles before they are offered or get a promotion. Look for patterns of certain demographic groups being more or less likely to get those opportunities or being in role longer than others who have gotten those opportunities.

Flight risk - Some HR technology solutions can evaluate employee data and tell you who is likely to voluntarily leave soon. Check this data against your demographics and see if there are patterns based on race, gender, or other factors like commute time. Then explore locations, managers, and any cultural reasons for patterns you see.

Pay equity - How organizations prioritize resources tells a lot about what and who they value. For employees, equity begins with compensation. Do a pay equity audit, assess disparities, and look for patterns that can be correlated to demographic groups. Then check with your legal counsel to understand whether differences are legally justified or there are gaps that need to be addressed.

Absences - Attendance patterns can also tell you a lot, especially where there are changes. If employees start taking more days off and you see it happening in specific departments, explore what's going on. It could be that the team just finished a huge project and their manager is making sure they have some time off. It could be that there are personality issues or other problems that mean people can't bear to come to work. It could also be anything in between. But an increase in absences is one of the first indicators employees are struggling with something.

Changes in engagement scores -If you start to see changes in engagement scores, check to see whether the changes make sense. Again, look at engagement by demographic. It will almost always tell a different story than the overall engagement scores. Also, evaluate how you track and measure engagement to see if it favors a homogenous view of success or whether there is plenty of room for difference.

Performance changes - Like absences, performance changes can be an indicator that there are problems. When you see performance scores shifting significantly, look at where they are happening and the demographics of who is having unusual increases or decreases. This can be an indicator of bias or simply a new manager who is learning how to effectively evaluate the people in their organization. Either way (or anything in between) is worth noticing and understanding to ensure everyone is treated equitably.