***Strategic Steps: Tactics & Insights***

1. **Understand “new” current state.**

* Understand ERG structure in existing and new company – both through documentation and dialogue.
* Understand nature of M&A activity and where ERGs fit. Will you need to build an ERG from scratch?

1. **Build leadership.**

* If possible, try to understand where current ERG leaders are moving.
* Solicit ERG leadership candidates.
* Confirm candidates have management approval for ERG leadership roles.

1. **Identify support structures in the corporate environment.**

* Determine if there are existing plans for ERG development.
* Solicit corporate executive sponsorship.
* Identify HR advisor for ERG.
* Confirm ERG budgets.
* Push company to participate in industry standard surveys like HRC Corporate Equality Index.

1. **Define future state goals.**

* Develop vision, mission and by-laws for new ERG.
* This is an opportunity to rethink the role of the ERG (e.g., move to BRG).
* Name and brand new ERG.
* Define internal policies that support/promote your vision/mission.
* Define first year objectives, activities and metrics for success.

1. **Don’t lose (and maybe improve?) your ERG’s connections and communications with people.**

* Assess likely membership in the post-change state. Include not only divestiture moves, but also consider retirements and voluntary resignations. These numbers tend to increase during times of change.
* Confirm adequate membership to be viable as an ERG.
* Develop online and hard-copy content to raise visibility and awareness.
* Drive engagement through marketing and communications channels.
* Connect chapters nationally and globally.

1. **Keep policies and benefits top of mind.**

* HR colleagues will be very busy and may not have priority on ERG concerns.
* Focus on forming a strong advocate relationship with HR.
* Understand current HR offerings so you can be in a position to influence future policies and benefits.
* Update ERG handbooks.

1. **Reach beyond your own company.**

* Gain clarity on what can and cannot be shared externally.
* Reach out to other companies for best practices, support, critical mass and joint activities.
* Reach out to non-profits. They can provide support and also be a source of volunteer opportunities.
* Advocating for equality does not need to be constrained within your own company

***Strategy Aside, This Is an Emotional Journey***

Emotions can be barriers to effective change, and keep people from focusing on your strategy and tactics.

* Not necessarily a linear process
* Use early adopters to help others
* Listen, listen, listen
* Members may fear for their jobs and detach
* ERG can be a source of hope and support through the change
* Provides a means to take care of self and others

Put people first and consider these insights.

* A person’s emotional journey is unique and not necessarily a linear process.
* Use early adopters to help bring others through the “valley of despair” so they can embrace the change.
* Listen, listen, listen.
* ERG members may fear losing their jobs and detach. This can be worrisome, but it’s not unusual.
* The ERG can be a source of hope and support through change.
* Plan communications and/or face-to-face activities to remind people you are there. This could help to re-engage members and recruit new ones, too.