

Citi Pride Affinity

Maximizing Your Delegation's 2021 Summit Engagement

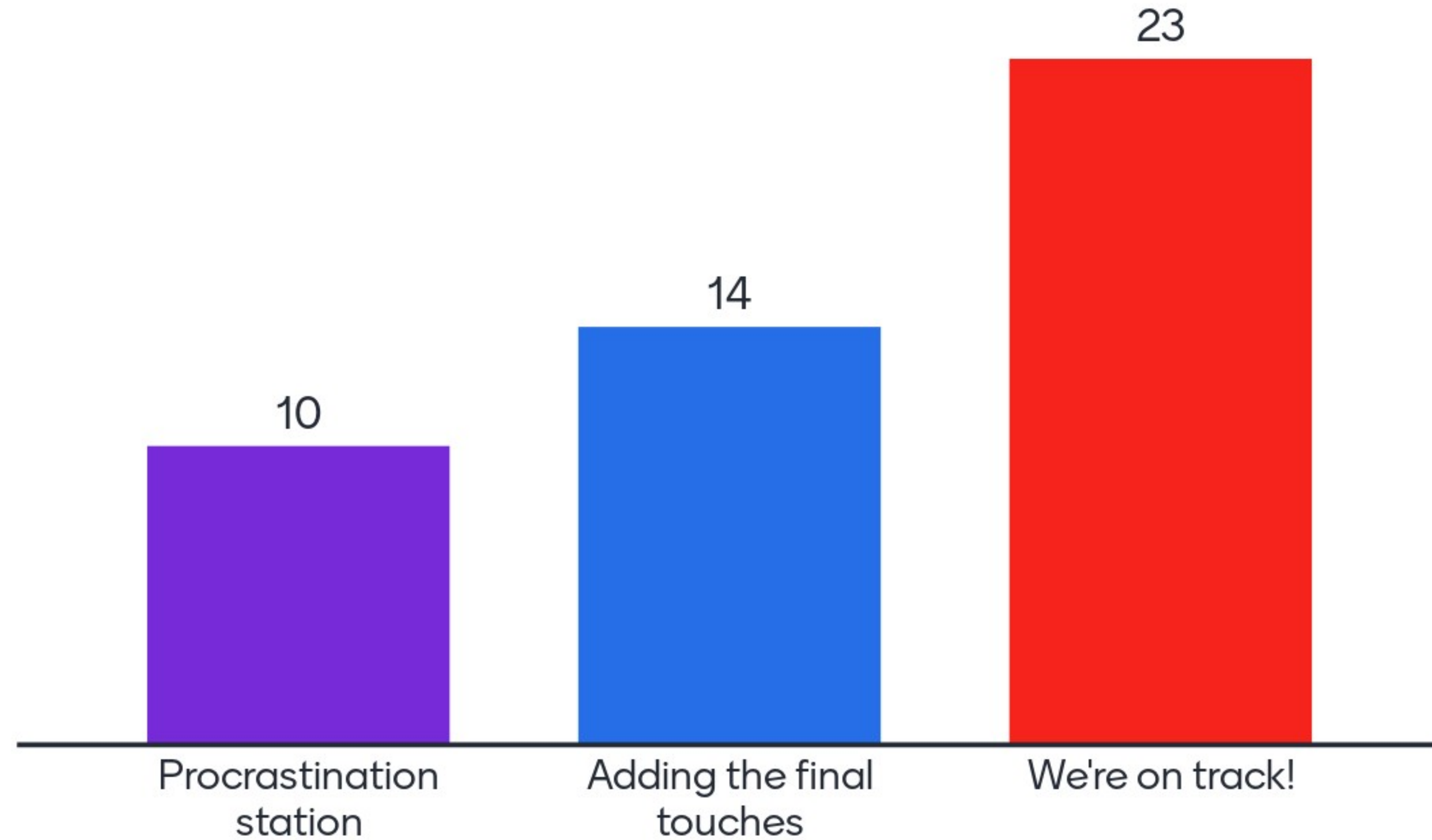
Workplace Summit Insights with Citi

September 9, 2021



CITI SUMMIT WEBINAR

How prepared is your organization to attend the 2021 Summit?





Creating a Culture of Belonging starts with us...

MEET TODAY'S CONTRIBUTORS



DORA ROSENBAUM

She/Her

Tampa

2x Attendee ('18 & '19)

Operational Risk Management



DREW KIRKBRIDE

He/Him

Chicago

4x Attendee ('16, '18, '19, '20)

Retail Partner Cards



DAVID DE LA CRUZ

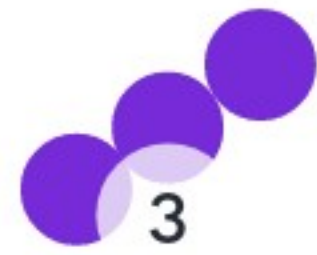
He/Him

New York

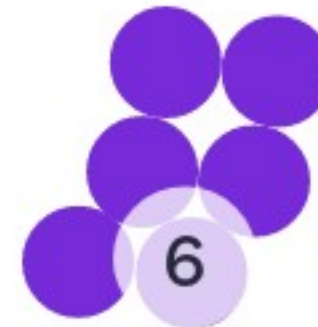
4x Attendee ('17, '18, '19, '20)

Private Bank Chief of Staff

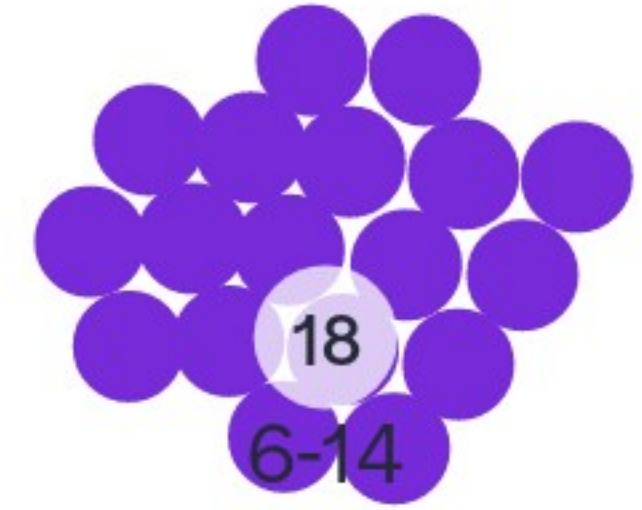
Roughly how many attendees will be joining the Summit from your organization?



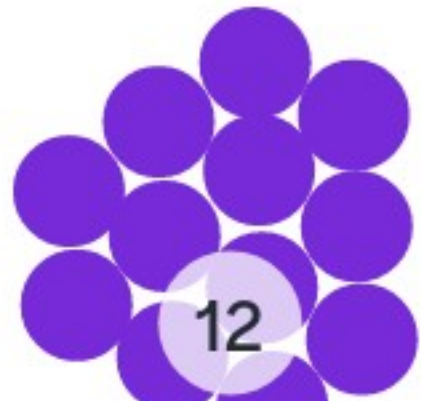
Just me



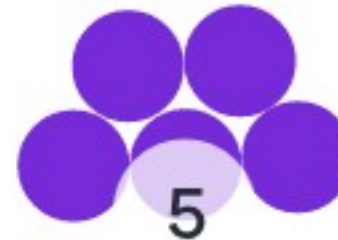
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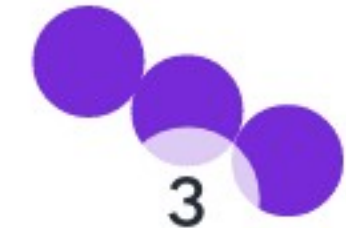
6-14



5-49



50-74



75+

SITUATION: EXPANSIVE ATTENDANCE FROM THE COMPANY

- 200K+ Employees

- 30-65 Out & Equal Delegates Annually

- ~70% First Time Attendees

- 11 Countries Represented

- 29 Pride Chapters

- Various Levels and Lines of Business

What are some challenges you face with attending O&E?

Time management

Starting the conversation

Overwhelmed with the plethora of content (will be doing more prep this time)

Management support

Navigating the different sessions

Bringing back deliverables.

Getting attendees from higher up in the org

Cost to send more people

Making sure that all of can cover as much as possible

What are some challenges you face with attending O&E?

Attending all the sessions I'd like

Engaging colleagues I don't know

Being the only one in the delegation...

I am from Germany, so time will be the biggest challenge for me I guess

Not knowing what to do as an ally.

Wanting to DO IT ALL with restricted time.

Sharing information between each of the candidates.

Attending virtually makes it difficult to connect with colleagues attending from around the world

Reserving time away from interruptions

What are some challenges you face with attending O&E?

Choosing my sessions!

Coordinating event-making sure participant are fully engaged

It's hard to separate work while attending virtually

Balancing work, while still focusing in a virtual world

Getting interruptions from back at office

Cost for larger participation

Sharing virtually with our delegation

We're very new and have no idea what to expect! Overwhelming! :)

Attending all sessions

What are some challenges you face with attending O&E?

No specific company focus

Knowing what sessions to attend

How to share what's learned with my company

which sessions to attend (i have only 5 people going)

Distractions as I will be at home attending virtually

Blocking focused time

Bandwidth share with regular goals and deliverables

Maintaining energy across multiple days

So many choices of sessions, so little time!

What are some challenges you face with attending O&E?

Zoom fatigue

Focusing on the content

This is our first time attend. I don't know how to make the most out of my experience.

Business interruptions during the event.

Balancing work while attending O&E summit.

Be more informed on how I can contribute

Staying focused virtually.

zoom fatigue

CHALLENGES THAT NEED TO BE ADDRESSED

- Disconnect on Affinity Goals

- Observe clique formation

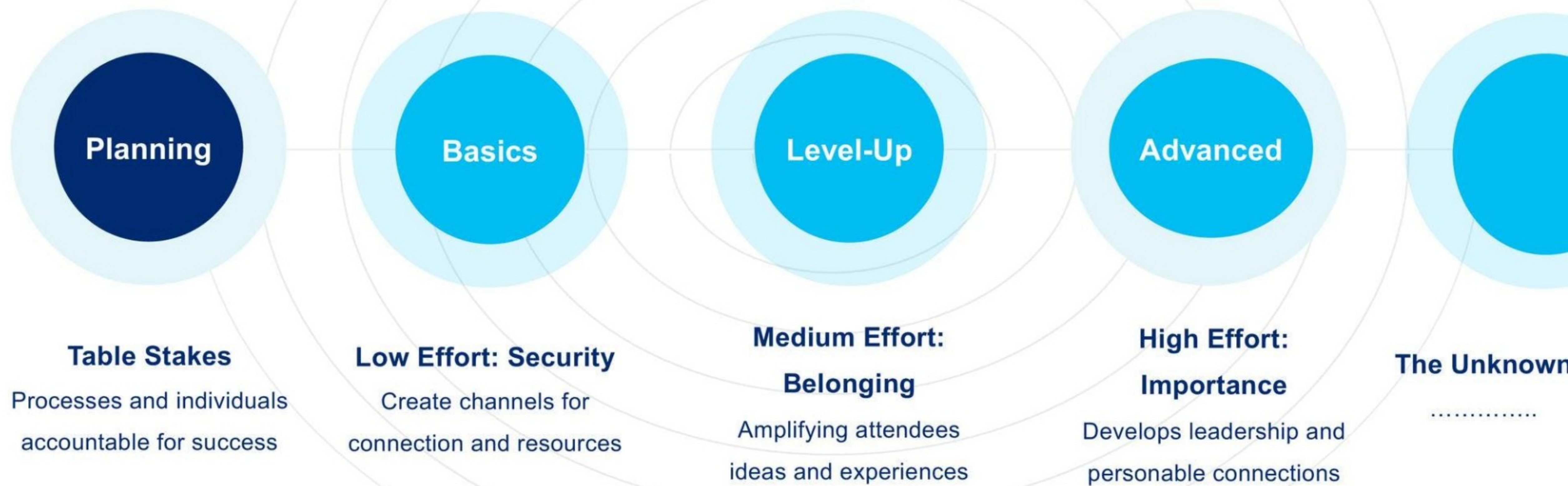
- Sharing of best practices

- Establishing strong networks after Summit

- Proving the return on investment

- Identifying attendees equitably

CATEGORIZING SOLUTIONS FOR MAXIMIZING ATTENDANCE



DEVELOP A STRUCTURE FOR SUCCESS

- Set your summit vision – “Let’s give them something to talk about.”
- Design an expansive steering committee
- Develop deliverables, timelines, assign owners, and set status meetings
- Add your own little splash each year!





MESSAGING PLATFORM

Initiate group chat to create excitement, develop network, share learnings.

Pro-Tip: Check company's policies, Opt-in, and not to replace O&E Pathable chat.



DELEGATE BOOK

Yearbook of the Delegation. Provides insights on the diversity attendees.

Pro-Tip: Collect information via survey tool; tie to the Summit theme



INS & OUTS OF OUT & EQUAL

Host call(s) prior to the summit to align the attendees on expectations, reinforce goals.

Pro-Tip: Promote O&E Pre-Summit Call

LEVEL-UP: MEDIUM EFFORT TACTICS



SESSION TRACKING

Create awareness of sessions attended to avoid duplication.

Pro-Tip: Not recommended >15



FEEDBACK LOOP

Survey post-conference; use as base-line for next year's actions.

Pro-Tip: Organize into buckets O&E, Goals, Programming



AMPLIFY

Create visibility utilizing int. & ext. communication channels.

Pro-Tip: Provide templates on LinkedIn posts for Delegates



EXECUTIVE ROADSHOW

Develop a summary for delegates to share with Leaders.

Pro-Tip: reinforces learnings, R.O.I, and continued support



AMBASSADORS

Assign known leaders to shepherd a group of 5-10 people with the intent support to all; especially first-timers. Develop collective recommendations to support the investment.

Pro-Tip: Promote Out & Equal Buddy Program!



LGBTQ+ LEADERSHIP DAY

Engage the delegation in an immersive training and discussions around authenticity as a foundation for developing as a leader.

Pro-Tip: Partner with O&E for a LGBTQ+ Leadership Development Program!

What activities have you introduced that were successful?

What's App group

Track captains with report backs post conference

LGBTQ Jeopardy in preparation for learning curves at Summit

Zoom meeting during Summit for our company attendees to connect during Summit

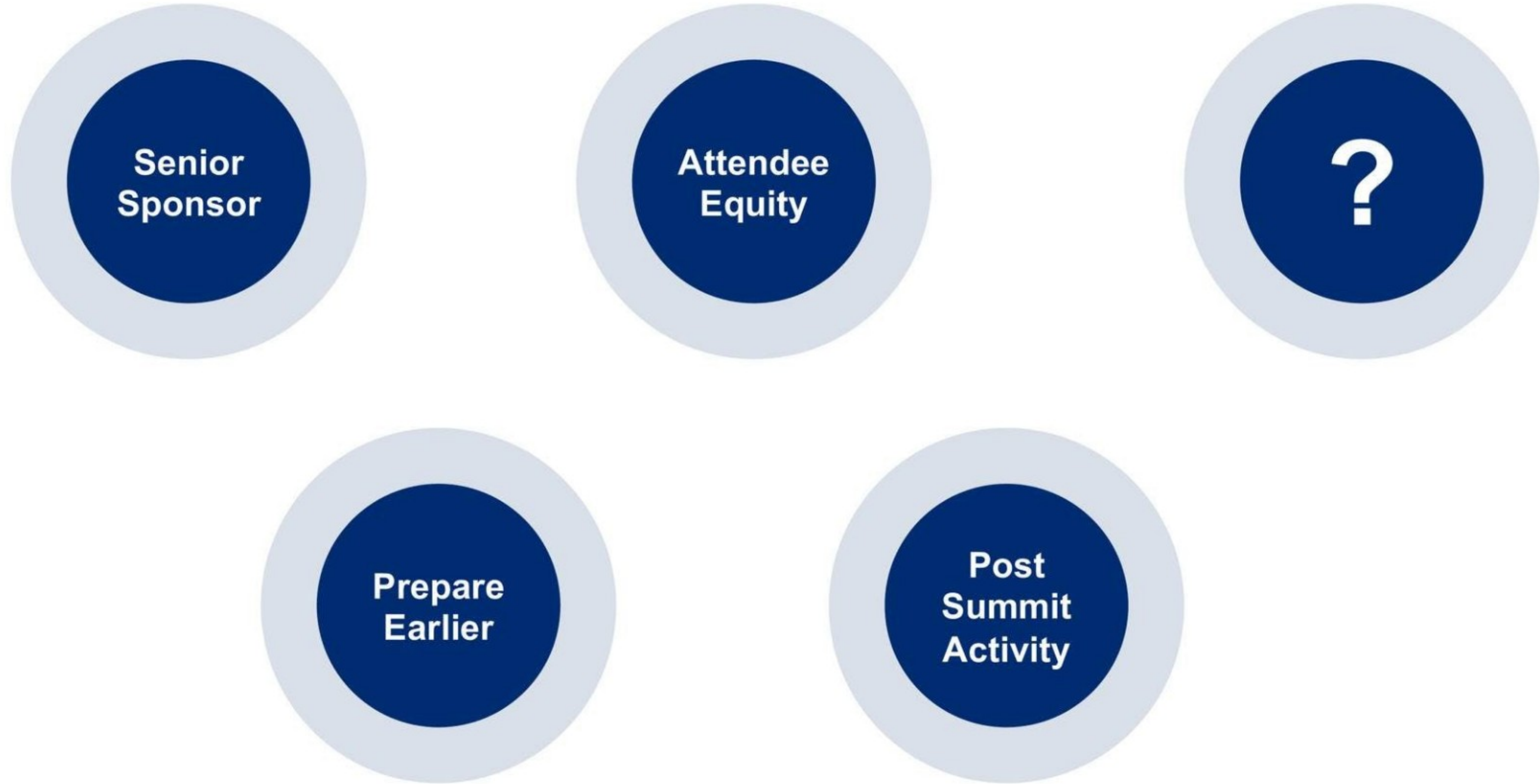
Planning to meet with the delegation to talk about the sessions to attend. Make a mix of personal interest and organization need

Buddy system for first timers

internal podcast about LGBTQ matters

Only my second year going to O&E - here looking for ideas! We did have a group Teams Chat last year where everyone shared great words of wisdom & moments from sessions

THE UNKNOWN... WHY WE COLLABORATE



LEAVING Y'ALL WITH THESE TAKEAWAYS

- ✓ Business of **Belonging** starts with US!
- ✓ Develop a **structure for success**; be inclusive with engagement.
- ✓ Lead **Now** & treat the Summit as your Playground

Ask me anything

5 questions

0 upvotes