

Preference, tradition or requirement (PTR)

Global Inclusiveness

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Improving the quality of our decision-making is most important when decisions impact our people's career trajectory and advancement – such as selection for teams, projects, opportunities and promotions. Surfacing different perspectives in these processes helps us to **identify blind spots** and **fosters better and more creative solutions**.

Deliberate reflection on preferences and traditions can help us get closer to what is actually **required** and reduce the influence of potential bias. It can also mitigate the impact of “**insider/outsider dynamics**”, e.g., situations where individuals or groups may have inconsistent experiences and access to opportunities.

The preference, tradition or requirement tool (PTR*) can help achieve this.

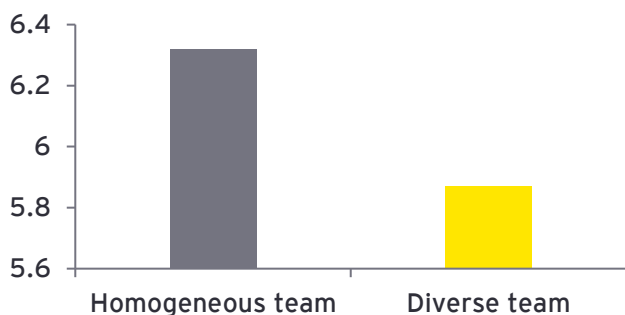
*Adapted from foundational principles articulated by Dr. R. Roosevelt Thomas, Jr.

Surfacing different perspectives has a positive impact on team performance

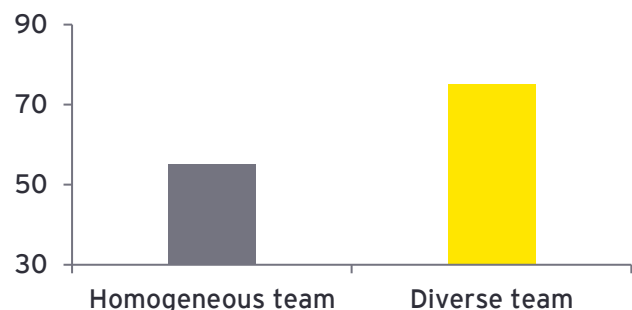
Research shows that homogenous teams, on average, are less accurate and actually less effective than inclusive teams that span a broad range of perspectives, backgrounds and experiences, even though working on a homogenous team often feels better and more effective.

We all have preferences and biases that can influence our decisions. It can be difficult to recognize our own biases, so it's important to seek out different perspectives when making decisions and to pause, reflect and challenge our decision-making criteria.

Perceived effectiveness



Actual results



Source: Phillips, Liljenquist, & Neale, 2009

What drives our decisions?

Inclusive leaders challenge decision-making by explicitly asking, “**Is this criteria or standard based on a preference, tradition or requirement?**” This can help surface the thoughts and potential biases that may be underlying certain processes, facilitate self-reflection and open a dialogue with team members about whether the criteria being used are relevant and appropriate. Following are examples on how PTRs may show up in our daily decision-making.

	Examples of how our thought process shows up	Criteria being used
Preference	"It's much better to hire an extrovert – they'll fit right into the team."	Choosing based on one's own personal inclinations.
Tradition	"This new software has features that allow for collaboration, but we have been using this other tool for many years, so let's stick with it."	Deciding based on historical practices and past decision-making.
Risk: Making decisions on preferences or traditions may unintentionally limit and/or exclude options that actually meet our requirements.		
Requirement	"She was selected for her financial analytics skills and exceptional client service, which are needed for this role."	Selecting based on fitting a set of essential criteria.
	This is optimal for most inclusive decision-making.	

Improving the quality of our decision-making by using PTR

Building a habit to explicitly ask ourselves and others, "Is this a preference, tradition or requirement?" – in other words applying "PTR" – can be an important tool to reveal the underlying assumptions of our thought processes and facilitate better decisions.

What is PTR?	PTR is a reflective tool to interrupt and surface hidden assumptions and potential biases that may limit decision quality. We use it to pause and consider what factors are truly relevant to the decision at hand. It's a set of questions that challenge existing processes and ways of operating.
Why use it?	PTR helps us make better quality decisions by reducing the influence of personal likes and tendencies, and the ways we have always done things.
When should we apply it?	It is particularly important to apply PTR where decisions may affect someone's career or future – such as hiring, team selection, assignments, promotions, secondments, leadership roles or any decision that affects the team overall.
How does it work?	Explicitly asking, "Is this a preference, tradition or requirement?" helps surface the thoughts and potential biases that are underlying certain processes. It also helps facilitate self-reflection and open a dialogue with team members about whether the criteria being used are relevant and appropriate.

Below are a few questions to consider for progressing inclusiveness for everyone, creating an environment where all differences are valued and everyone has access to the opportunities they need to contribute fully and grow.

- Do we consider the range of perspectives, backgrounds and experiences of our team members when we decide who we should bring to client meetings?
- What work styles do we have on our teams and how do we capitalize on them to support people to work more flexibly to achieve their goals and deliver exceptional work?
- What preferences and traditions may result in certain individuals not being picked for assignments, or being deferred or not promoted?
- How do we assess leadership potential? How might our criteria be limiting our pool of talent? Are we in any way giving an advantage to those who are like us, or a disadvantage to those who are different from us?
- Does our succession planning consider a broad range of talent?
- What barriers do we need to remove for everyone to access the resources and opportunities they need to progress and grow? (this might include examining behaviors, processes, norms and practices)

To find out more, visit ey.com/inclusiveness

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