



Charlotte Sweeney Associates®

CONSULTING EXCELLENCE DECLARATION 2024

DECLARATION

Charlotte Sweeney Associates (CSA) is a specialised Diversity, Equity and Inclusion (DEI) consultancy that works with companies around the world to understand, create and deliver their DEI aspirations.

Our key services offered are:

- Strategic consultancy
- Board and Executive Level support and coaching
- Leadership Development
- Consultancy advice for all elements of DEI for the company eco-system, from people to supply chain, marketing and product development.

We've worked in partnership with hundreds of companies around the world covering the majority of sectors, including, FMCG, Luxury Brands and Hospitality, Financial Services, FinTech, Healthcare, Consultancies and Professional Services, to name a few.

Our CEO, Charlotte Sweeney OBE, is a recognised thought leader in this area which includes a bestselling DE&I book that was been shortlisted by the Chartered Management Institute (CMI) for the Management Book of the Year 2018 and acknowledged as one of the best HR thought leaders in the UK in 2022.

CEO: Charlotte Sweeney, OBE



How we excel through CLIENT SERVICE AND VALUE



We provide excellent consulting services which deliver the outcomes clients seek and need.

From the very start of our client relationships, we focus on the outputs the client is truly looking for and we discuss different, and appropriate, ways in which the outcome can be achieved.

We focus on creating clarity on the scope of the project for everyone involved as well as develop the most appropriate measures to review the progress being made (against what was agreed) as well as the impact of the work that is being conducted.



We are transparent with clients and respond to their concerns.

Our mantra and way of operating is to be transparent with our clients on every element of project delivery and every element of the relationship. For example, we ensure we have regular meetings with the client throughout the life of the project and relationship. We focus on fostering an inclusive relationship where we are all open to feedback, sharing views and perspectives. Our ambition with all clients is to be considered as part of the internal team to really partner with them on all project delivery.

If a client is not comfortable, for any reason, to share feedback with their key contact from CSA, we ensure they are able to contact either the Managing Director or the CEO directly to discuss any feedback or concerns.



We always strive to improve the value we can deliver to our clients.

In every interaction with clients, we ensure there is a full evaluation process that takes place - this will include (i) a review of the work conducted and delivery to the original scope and (ii) feedback from the client on the quality of the work and the relationship. We always ask our clients if there is anything we could do differently next time and if they would work with us in the future (as well as if they would recommend us to others). This information feeds into our continuous improvement ethos.

We also conduct an internal review to assess (i) the quality of the output to the client, (ii) what went well and what could be done differently next time and (iii) if we would be happy to work with the client again.



How we excel through ETHICAL BEHAVIOUR

Certified



We are responsible, good citizens

We are a B-Corp Certified company, gaining our certification earlier this year. This certification underscores our unwavering commitment to social and environmental responsibility. Grounded in sustainability, transparency, and accountability, we champion inclusive workplaces and communities. We have also gained 'Living Wage Employer' certification as well as being identified as a Women Owned Business by WeConnect. We take these commitments seriously and continually discuss these aspects with our clients.

As our business is focused on delivery both **globally** and **locally**, we donate both our time and finances to two charities that are close to our heart and the work we do:



1. The Centre Global Inclusion -
<https://globaldeibenchmarks.org/>



2. Conscious Youth -
<https://consciousyouth.co.uk>

We also advise organisations on what they should be doing to deliver their ESG aspirations, including diversifying their supply chain, inclusive marketing and product design as well as how they treat their employees.



We conduct business ethically

All of our dealings with clients, partners and service providers are delivered with the highest ethical standards.

We ensure that all work is delivered and communicated in a transparent manner.



We conduct business sustainably

We are committed to ensuring that we increasingly strive to operate in a way that ensures sustainability is considered by our clients as we work with them. As a B-Corp accredited company, we are proud to adhere to high standards of social and environmental performance.



We foster an ethical culture

Creating a psychologically safe workplace for our employees as well as our consultants is critical to us.

We focus on ensuring that our people feel able to speak up about anything that concerns them either within our business, how we are working with our clients or anything related to what the client may say or do.

It is also important that our clients feel they have created a relationship with us where they feel able, and comfortable, to raise any issues that are important to them.

How we excel through PROFESSIONAL DEVELOPMENT



We undertake training and professional development planning each year.

Every member of the team has a personal development plan as part of their performance plan. This is reviewed with the CEO on a quarterly basis and includes (i) professional skills development as well as (ii) focus on any feedback received from clients.

We have an ethos of 70/20/10 – 70% development is on the job, 20% is mentoring and coaching and 10% formal development.

All of the above is discussed and included within the regular 1:1's and team feedback.



We promote strong core consulting capabilities and specialisms in our consultants and teams.

Charlotte Sweeney OBE as the CEO has Chartered Management Consultant Status. As part of everyone's development plan, they use the skills and behaviour matrices from the MCA.

They are reviewed on their progress on a ½ yearly basis. The aspiration is that, over time, all consultants within the business will gain their chartered status.



We support our employees' career progression, professional development and welfare.

We constantly strive for the best performance and delivery from all our employees, regardless of their specialism. We support all professional and personal development as outlined on the left.



How we excel through commitment to DIVERSITY AND INCLUSION



We respect and embrace diversity and inclusion and understand the importance and positive benefit of people from different backgrounds working for our companies and our clients

Our consultancy is one that specialises in diversity, equity and inclusion and supports our clients to create workplaces that work for all. Given this, it is important that we 'walk our talk' and demonstrate what we do for our clients within our business.



We recruit and retain people from a diverse talent pool and strive to build cultures where difference is valued, respected and celebrated at all levels. Furthermore, we are committed to developing diverse future leaders and ensuring their progression in the industry.

This is what we do as a business. Our employees and consultant base are a diverse mix of people from around the world, different genders, ethnicities, ages, physical abilities etc.

Our consultants have a clear progression and career path which is discussed and agreed with them.



We support industry efforts to improve progress on diversity and inclusion, implementing best practice and monitoring the diversity of the consulting sector workforce over time. This includes encouraging the collection of data to assess the effectiveness of D&I policies and participating in the MCA Annual report.

We support industry efforts to improve Diversity and Inclusion by contributing to the MCA's D&I working group and the working group's continued work on multiple iterations of the D&I Toolkit.





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