

DEI Reflection Questions

This document corresponds to the lessons in the Carson Coaching Online (CCO) course, **Missed Opportunities: DEI in the Financial Services Industry**. As you work through the course, we provide an opportunity for you to reflect on what you found to be the most impactful in each lesson. This document will help you remember what you learned so you can apply it to your firm's DEI efforts going forward.

Lesson 01: Recognize Missed Opportunity

01 Where could YOU be missing opportunities?

Lesson 02: Analyze Basics of DEI by Defining Key Terms

01 What terms were new to you in this section?

02 Do you now have a different and/or better understanding of any of the terms?

Lesson 03: Review History and Discover Roots of Oppression*

01 Growing up, I learned about different racial groups from my:

02 The first time I realized not everyone was the same race as me was:

03 The first time I remember having a person of a different race or ethnicity in my home was:

*SOURCE: [Inclusive Communities Workshop](#) held at Carson Headquarters.

Lesson 05: Create an Action Plan

01 In which of the problem areas have you or your firm contributed to at some point in the past?

02 What behavioral or policy changes could you make that might begin to address some of these problems?

03 When did your openness or curiosity lead to new relationships?

Summary Reflection Questions

01 What was the most surprising thing you learned in going through this course, and what do you want to do with that information?

02 What did you learn from this course that you want to share with a friend or colleague?

03 This course was about learning AND taking action. What will you commit to doing tomorrow?

Summary Reflection Questions (continued)

04 What will you commit to doing this month?

05 What will you commit to doing this year?



Carson Group
13321 California Street
#100
Omaha, Nebraska 68154

carsongroup.com
800.514.9116
coaching@carsongroup.com