Top Insights for the World's Leading Executives

2017–2018 Annual Edition

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Inside

Navigating a World of Great Expectations

The past several years have seen a lot of upheaval. The aftermath of the financial recession, political, and natural and man-made disasters have taken their toll on people in most developed countries. Employment rates continue to flag, confidence in institutions is down, and wages are only finally starting to recover. It's easy to imagine a wave of pessimism settling in for some time to come.

But that would overlook another, far more positive story. Amid the negative headlines, real life has changed for the better in ways both small and profound. Perhaps most obviously, the ease of finding the exact product you want, securing a compelling price for it, and getting it—delivered to your home, for free—has moved from a delightful rarity to a daily experience.

However, that experience has not only saved people time and money, it has also altered perceptions of what is "normal." Regardless of industry, category, or geography, suppliers worldwide feel pressure at every turn to meet higher expectations, often in the face of their own very real cost concerns. As one executive put it, "It doesn't cost customers anything to expect everything."

As it turns out, expectations are not only costless they also lack boundaries. What's learned as a customer quickly becomes the norm for employees in the workplace, for example. Similar to suppliers, employers report staff have higher expectations of everything from coaching and development opportunities to compensation. And for their part, employers have heightened expectations of employees. For example, they expect them to embrace constant organizational change, become ever more "digital," and take on more responsibility in flat organizational structures.

Struggling to Keep Up

While expectations may be free to have, they are anything but free to meet. A small number of firms may have made their supply chains as efficient as possible, but most still struggle to safeguard margins under relentless customer pressure on pricing and availability. Costs associated with providing a compelling employee value proposition are very real—and seemingly unavoidable in the face of highly mobile top-tier talent, and increasing mobility across the ranks. How can leaders balance the pressure to meet stakeholders' demands with their organization's economics?

A Better Way Forward

The good news is that progressive organizations are finding ways to thread this needle. Across industries and geographies, we have seen the best companies making targeted investments and re-engineering processes, but just as importantly finding ways to solve their problems with existing resources. The following pages highlight findings from our research and real-life examples of functional leaders who are successfully navigating our shared world of heightened expectations.

Human Resources

Create an Organizational Culture That Performs

Drive Change Through Process, Not People

◆ Challenge

Today's disruptive workforce trends, such as remote workers, shorter employee tenure, and frequent team structure changes, make culture difficult to manage.

◆ Typical Approach

Many companies rely on people-focused activities, including asking senior leaders to help the right behaviors "go viral." However, employees still struggle to understand, translate and embody those behaviors.

◆ Best Practice Solution

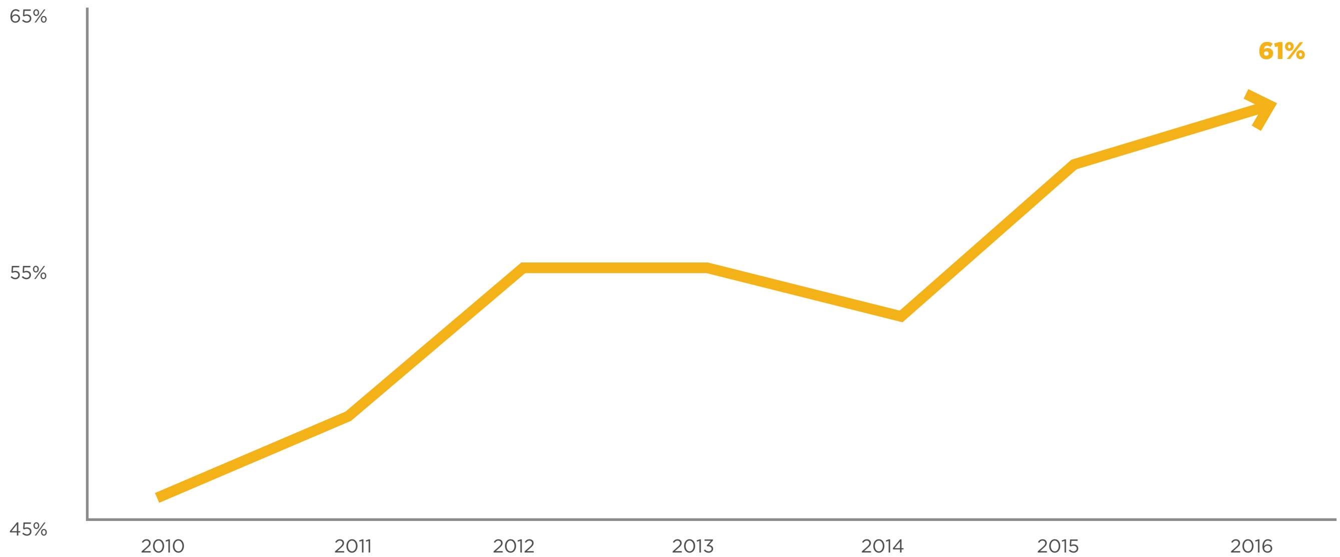
The best companies shift from a people-focused to a process-focused culture strategy to improve workforce-culture alignment (WCA). Organizations with high WCA employ workers with the knowledge, mind-set, and behaviors that align with their desired culture. High WCA can result in a 9% increase in revenue performance and a 22% increase in employee performance.

"**We've invested in everything from external consultants to employee training. But when we look at where we were before these efforts and where our culture is now, it's as if nothing has happened, and we are back to square one.**

VP of HR
Energy Organization

Our Definition of Culture:
Culture is the set of behavioral norms and unwritten rules that shape the organizational environment and how individuals interact and get work done.

Greater Investor Scrutiny of Culture
Percentage of Companies Discussing
Talent in Earnings Calls



Source: CEB analysis.

Culture Is in the Hot Seat

Culture is the most discussed talent issue on earning calls. With mentions growing 12% annually, more CEOs are expecting their CHROs to invest and deliver on culture initiatives.

Despite most companies now spending more than US$2,000 per employee on culture management activities, just 3 in 10 HR leaders are confident that their organizations have the culture they need to drive future business performance.

Why Don't Organizations Have the Necessary Culture?

Creating a high-performing culture is not about picking the "right" type of culture. Companies must focus on implementing the culture that fits their business strategy and maximizing WCA, which measures following employee qualities:

- **Knowledge—**They should know what cultural qualities senior leaders think the organization needs to be successful in the future.
- **Mind-Set—**They should believe the culture will make the company more successful and be committed to upholding it.
- **Behavior—**They should incorporate the culture into how they do their jobs and rely on it to guide them through unfamiliar situations.

To make WCA work, all three attributes need to be improved simultaneously and for all employees.

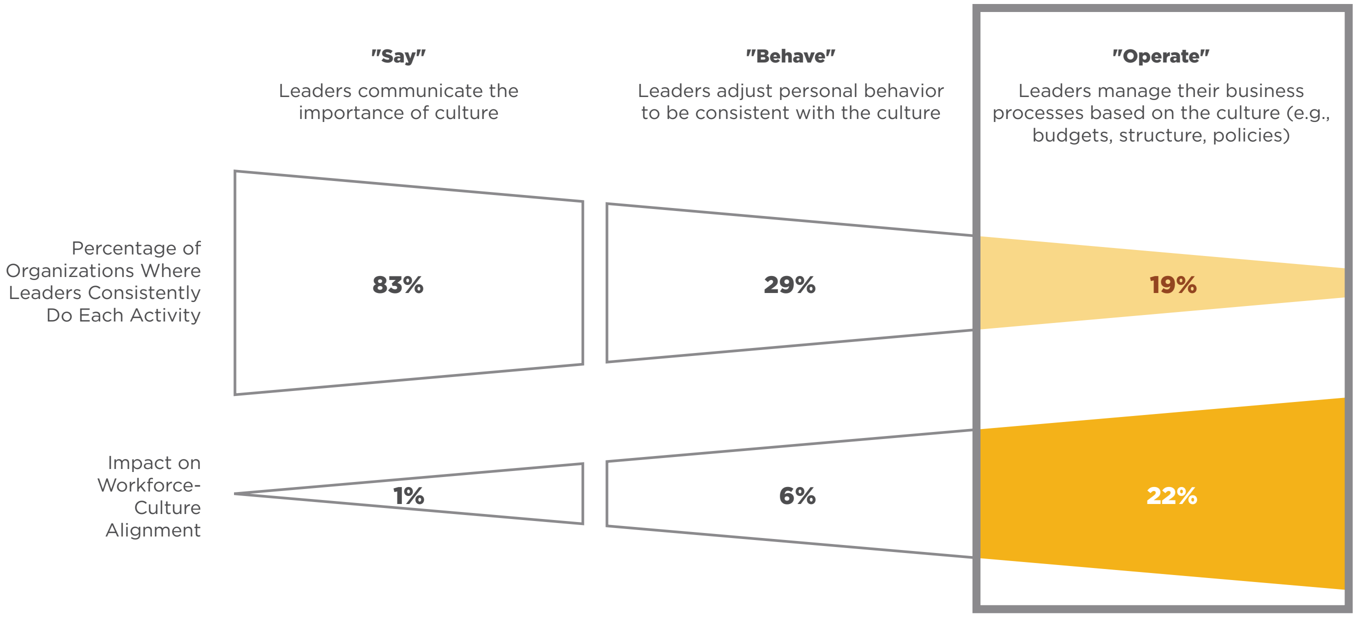
Why Most Culture Strategies Don't Work

Common culture management activities heavily focus on changing some aspect of employees. They either generate buy-in for the culture among people internally or go out and find people who fit the culture they need. However, this does not significantly improve employee knowledge, mind-set, and behavior.

For example, most companies ask senior leaders to role model the culture they desire. However, communication and behavior, which have the least affect on WCA, are also the aspects of role modeling that most leaders emphasize. The greatest impact on WCA is from those who embed the culture in how they manage business processes, which very few leaders do.

Leaders Underinvest in Updating Business Processes

Impact of Leader Activities on Workforce-Culture Alignment



n = 7,501 employees.

Source: CEB 2017 Culture Workforce Survey, CEB 2017 Culture Benchmarking Survey.

Change Processes to Drive Workforce-Culture Alignment

Companies must make three critical shifts to move from a people-focused to a process-focused strategy.

1. **Understand the Culture.** Instead of gathering input on employee satisfaction, identify actionable culture intelligence through employee-led diagnosis. Monitor how employees experience the culture and empower them to interpret culture feedback.
2. **Help Employees Operationalize the Culture.** Communicating the "what" and "why" of culture to build buy-in is not enough. Equip employees to apply the "how" of culture in their day-to-day work.
3. **Maximize Leader Impact.** Don't just train leaders to personally model desired behaviors, require leaders to design processes that support the culture.

Companies that make these shifts can achieve a high workforce-culture alignment, resulting in:

- Up to 9% improved revenue performance,
- A 22% increase in employee performance,
- A 16% improvement in reputation performance, and
- An 8% performance improvement against talent management goals.

Move from Insight to Action

Access these resources to drive more benefit from your culture initiatives.

- Benchmark Your Culture Management practices
- Assess Your Workforce-Culture Alignment
- Communicate Culture Strategy to Your CEO and Board

Contact us to get started.
topinsights@gartner.com

Rethink Expectations for Manager Coaching

Improve Employee Performance by up to 26%

◆ Challenge

Organizational structure, performance management, and career expectations have changed how employees work today. In fact, nearly 40% of the skills employees apply on the job were gained within the last year.

◆ Typical Approach

Learning and Development (L&D) relies on managers to take a continuous, "always on" approach to developing employees across a broad range of skills. However, this approach overwhelms managers and degrades employee performance by 8%.

◆ Best Practice Solution

The best L&D functions focus on developing and supporting Connector Managers who personalize coaching to resonate with employees, power the team for peer development, and partner for best-fit connections.

> **Our managers went through many programs. The feedback was positive and the programs helped them in their day-to-day, but they didn't get them to where we need them to be in the future.**
>
> Head of Global Manager Development
> Software Services Provider

L&D is Leaning Heavily on Managers

The average manager spends just 9% of his/her time developing direct reports, but most organizations' L&D teams would like managers to increase this to more than 30%. In reality, managers are overworked and overburdened, causing manager quality to stagnate and employees to feel they lack the skills they need for their current jobs and future careers.

It is clear L&D wants managers to have a bigger role in developing employees. But is L&D right to expect managers to take an always-on approach?

Typical Manager Approaches to Employee Development

Our analysis of nearly 90 variables evaluating demonstrated manager behaviors and their effectiveness found that all managers fall into one of four distinct coaching and development profiles:

- **Always On Managers** provide continuous, frequent coaching, drive development, and give feedback on a breadth of skills.
- **Teacher Managers** develop employees based on their expertise and experience, providing advice-oriented feedback.
- **Cheerleader Managers** take a hands-on approach to development; give empowering, positive feedback; and enable employees to direct their own development.
- **Connector Managers** introduce employees to others for coaching and development and provide targeted feedback.

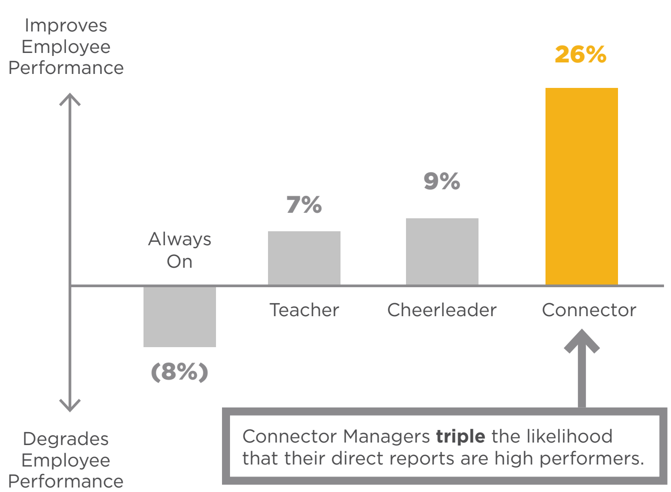
Which Manager Approach is Best?

Connector Managers are the best by some distance, as they improve employee performance by up to 26% and triple the likelihood that their direct reports become high performers.

On the other hand, the manager type many organizations have strongly prioritized above all others—the Always On Manager—does more harm than good.

Connectors Drive Employee Performance

Maximum Impact on Employee Performance by Manager Approach to Coaching and Development



n = 7,309 employees.

Source: CEB 2017 Manager Effectiveness Survey.

How Connector Managers Succeed

Fifty-seven percent of employees report that they develop new skills through their colleagues. But Connector Managers don't just pair up employees with colleague mentors and wish them well. They perform many core coaching activities, and foster three distinct types of connections. Connector Managers:

1. **Personalize** by tailoring development to employee needs and interests,
2. **Power** the team for peer development by promoting their reciprocal and real-time learning, and
3. **Partner** for best-fit connections by teaching employees how to learn from new contacts and helping them expand their networks and experiences outside the manager's realm.

Three Ways to Develop Connector Managers

If you want to empower managers to drive better performance without alienating their people, do the following to shift your focus to developing Connector Managers across the organization:

1. **Develop** managers who can diagnose employee needs. Instead of asking managers to coach and develop all their employees' needs, focus on helping a) diagnose individual employee development needs and interests, and b) tailor development activities to suit.
2. **Equip** managers to foster team development. Instead of focusing exclusively on helping managers understand how to drive individual employee development, equip them to foster team development and peer skill sharing.
3. **Enable** managers to improve connection quality. Instead of just enabling employees to make more development connections, empower managers with the tools and processes to increase the quality of those connections.

Move from Insight to Action

Access these resources to boost manager quality.

- Build the Case to Rethink Manager Development
- Assess Your Current Manager Coaching Capabilities
- Follow Top Tips to Create "Connector Managers"

Contact us to get started.
topinsights@gartner.com

Address Pay Equity Today, Not Tomorrow

Three Lessons to Solve Pay Inequity

◆ Challenge

The workplace is becoming more diverse, but progress toward equal pay for equal work has stalled. Much of the pay equity gap is due to differences in environmental factors, but the remainder (7.4%) cannot be explained so easily and must be corrected by the Rewards function.

◆ Typical Approach

Most organizations have only started addressing pay equity in the past two years, running analyses on an ad hoc basis. Despite this increased focus, role-to-role pay gaps are trending upward at an average rate of 0.17% per year.

◆ Best Practice Solution

The best organizations address pay equity by integrating assessments with current compensation practices, managing employee perceptions through open communication, and proactively preventing pay gaps from recurring throughout the talent lifecycle.

“When employees are new to role, there really shouldn’t be major differences in their base pay. These guidelines allow us to ensure we are correcting any previous discrepancies...

Manager, Compensation
Mu Corporation

A World of Increasing Inequality

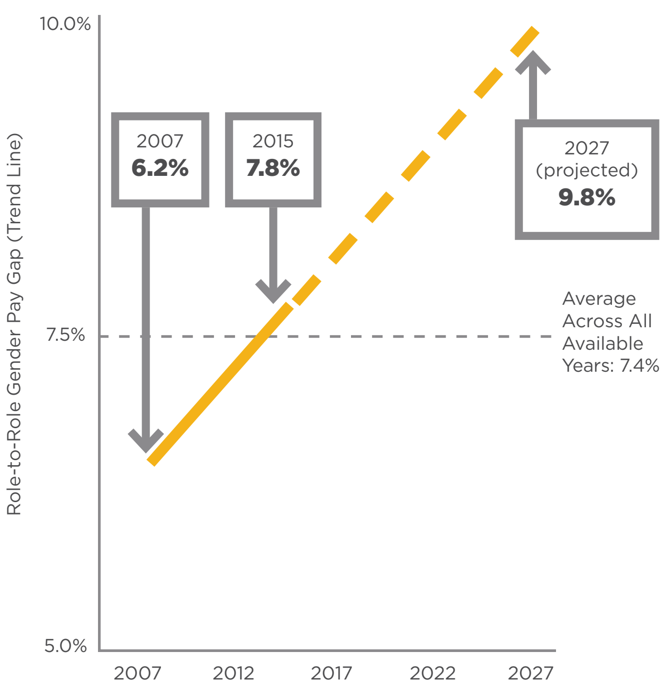
By 2027 almost 60% of the US labor force will be made up of women and racial/ethnic minorities. In the EU, women will make up 50% of the workforce.

Today's role-to-role gap of 7.4% equates to women earning just 93.1 cents for every dollar earned by men for comparable work. Unfortunately, projections show that this gap will continue to increase by 0.17% per year.

Immediate investment in pay equity enables executives to reduce the long-term cost of equity management. Companies that close gaps and maintain equity now will pay less than those that wait because the average cost to correct gaps increases by $439,000 annually.

Pay Gaps Are Widening Over Time

Trend Line in Average Role-to-Role Gender Pay Gap by Year



n = 505,438.

Source: CEB analysis; Glassdoor.

Ad Hoc Pay Equity Initiatives Are Unsustainable

When pay equity initiatives are ad hoc they leave companies open to increased legal, talent, and reputation risks, as well as requiring significant work between adjustments.

Companies can minimize work for the compensation team and reduce risk by integrating assessments to prevent recurring gaps and manage adjustments more easily.

Pay Gap Perceptions Drive Turnover

One in three employees believe pay gaps exist at their organization. When employees perceive a pay gap there is a 16% drop in intent to stay. This is equivalent to a high-performing employee being rated "meets expectations" or lower, or believing he or she could earn 30% more doing the same job at another company.

Rewards executives must address employee perceptions of pay gaps through open communication instead of relying on correcting gaps to drive employee outcomes.

Current Talent Practices Perpetuate Pay Gaps

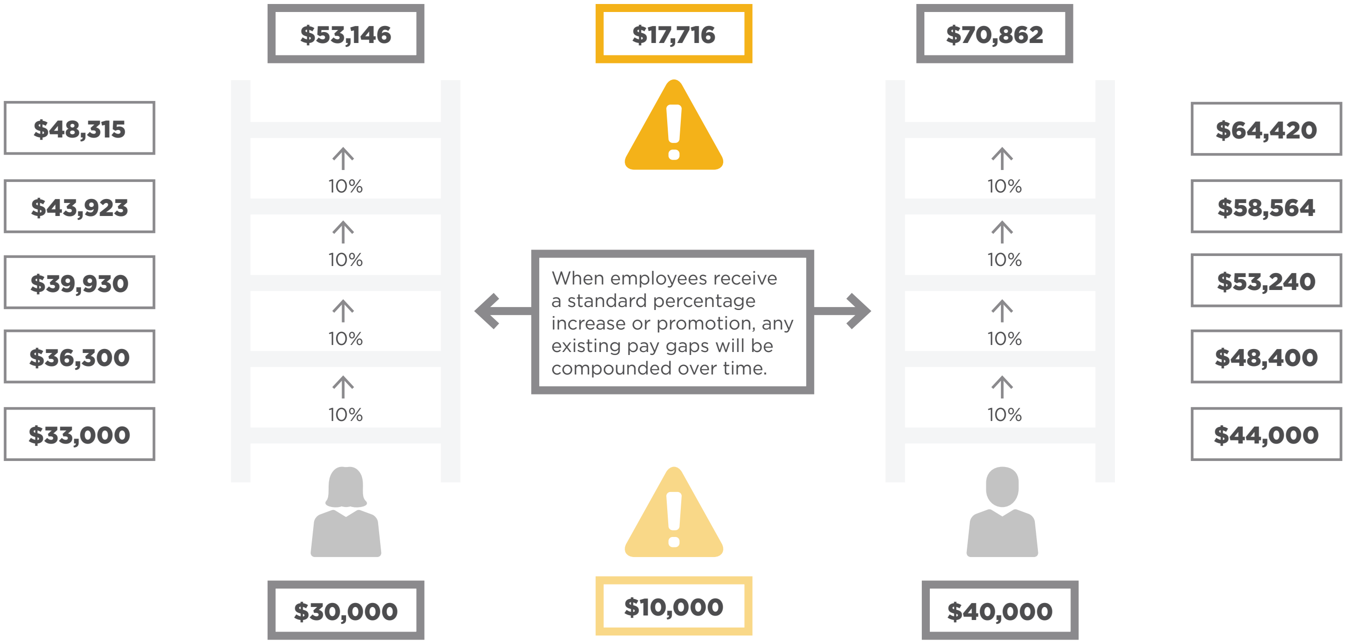
Most executives agree certain practices within the employee life cycle can create or perpetuate role-to-role pay gaps.

Prevent pay gaps throughout the compensation life cycle rather than limit efforts to assessing and correcting such gaps. For example, during:

- **Recruiting—**Attract and build diverse talent pipelines.
- **Hiring—**Don't use the candidate's previous salary to set offers and determine equitable salary offers.
- **Performance Management—**Allocate bias-free incentive rewards.
- **Promotion—**Approve equitable promotion-based increases.

Prevent Perpetuating Pay Gaps During Promotion

How Percentage Increases in Base Pay Affect the Gender Pay Gap



Source: CEB analysis.

Move from Insight to Action

Improve pay equity at your organization with these resources.

- Benchmark Your Pay Equity Maturity Against Other Organizations
- Review Best Practices from Early Adopters
- Stay Ahead with Our Trend Data

Contact us to get started.
topinsights@gartner.com

Sales and Marketing

Driving Growth Through Smarter Account Management

Why Accounts Aren't Growing, and What to Do About It

◆ Challenge

Despite expanded product portfolios and increased investments in value-added services, Sales organizations have failed to drive cross-sell or upsell and achieve growth with existing accounts.

◆ Typical Approach

The playbook most account managers use to grow accounts involves delivering high-quality service, driving product value and consumption, and exceeding customer expectations. Yet this service approach is not only ineffective for driving growth, but leads to wasted effort and missed opportunities.

◆ Best Practice Solution

High-performing account teams retain and grow existing accounts by laying out a vision for how customers can improve their business in the future, offering a unique yet critical perspective on how to achieve their objectives.

"The potential for cross-sell and portfolio expansion with our clients has never been higher, but we just can't seem to execute.

VP of Sales
Life Sciences Company

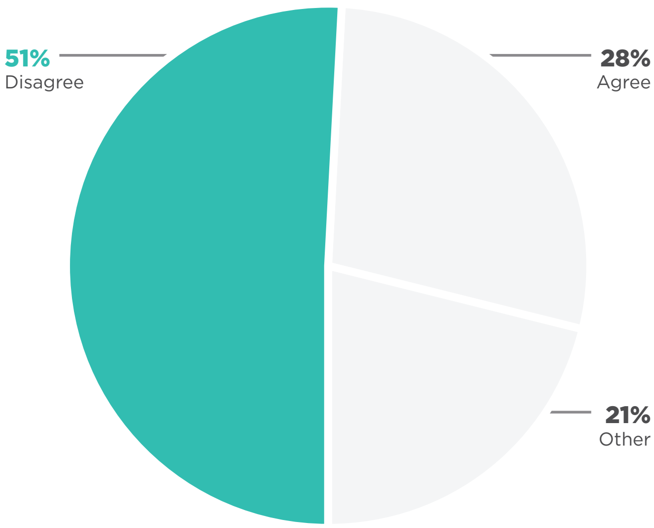
A Paradoxical Challenge

Sellers have more to sell—but struggle to sell more.

Sales leaders say their teams' portfolios have more than doubled in size, which means more pressure on them to find growth within existing accounts. However, despite Sales teams having more to sell, actual growth from current customers has fallen short of these expectations. In fact only 28% of Sales leaders report that account management channels regularly meet their cross-selling and account growth targets.

Sales Leaders’ Satisfaction with Account Growth

Our existing account management channels regularly meet their cross-selling and account growth targets.



n = 47 sales leaders.

Source: CEB 2016 Sales Leader Poll.

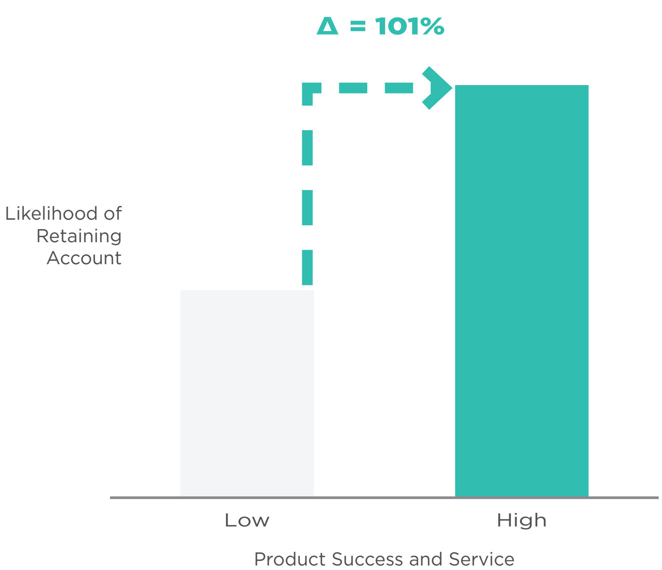
Account Growth in an Anti-Shrinkage System

So why have seemingly favorable conditions failed to produce account growth, and what can we do to fix it? The answer begins with the nature of the account manager role and the sales infrastructure that Sales teams have created around it. While the hunters of the Sales force can focus their energies solely on selling, account managers are typically responsible for not just identifying (and sometimes pursuing) account growth opportunities, but also the wide range of service and support activities meant to keep customers happy and loyal.

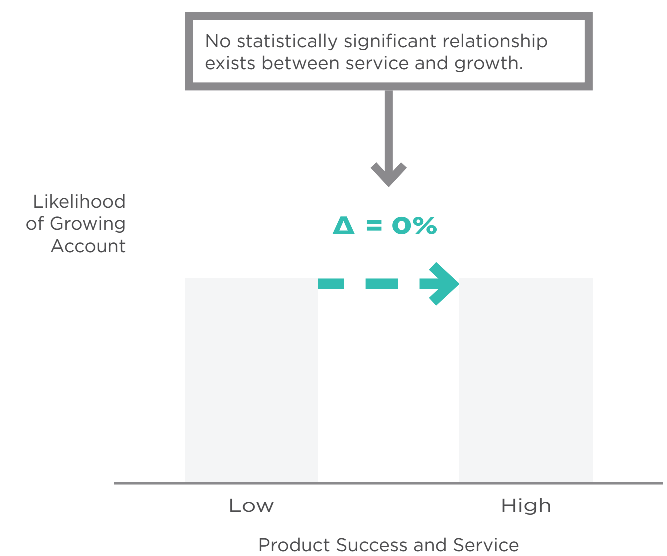
The sheer scope of the role makes it easier for account managers to deprioritize challenging growth activities and focus instead on service. What's more, the system of incentives and values around the role reinforces this inclination toward service. The net effect is an anti-shrinkage system that finds account managers prioritizing retaining existing customers over increasing account spend.

Service Doesn’t Drive Growth

Impact of Product Success and Service[a] on Retaining[b] Account
Indexed



Impact of Product Success and Service on Growing[c] Account
Indexed



n = 745.
Source: CEB analysis.
[a] Product success and service is defined as account manager focused on resolving issues and helping customers realize the full value of their purchase(s).
[b] Retaining account is defined as the customer elected to repurchase from the incumbent supplier for the commercial interaction in question.
[c] Growing account is defined as either 1) the customer purchased incremental product/service and/or 2) the customer purchased unrelated but net-new products or services and/or 3) the customer upgraded an existing product or service.

Service Won't Save Us

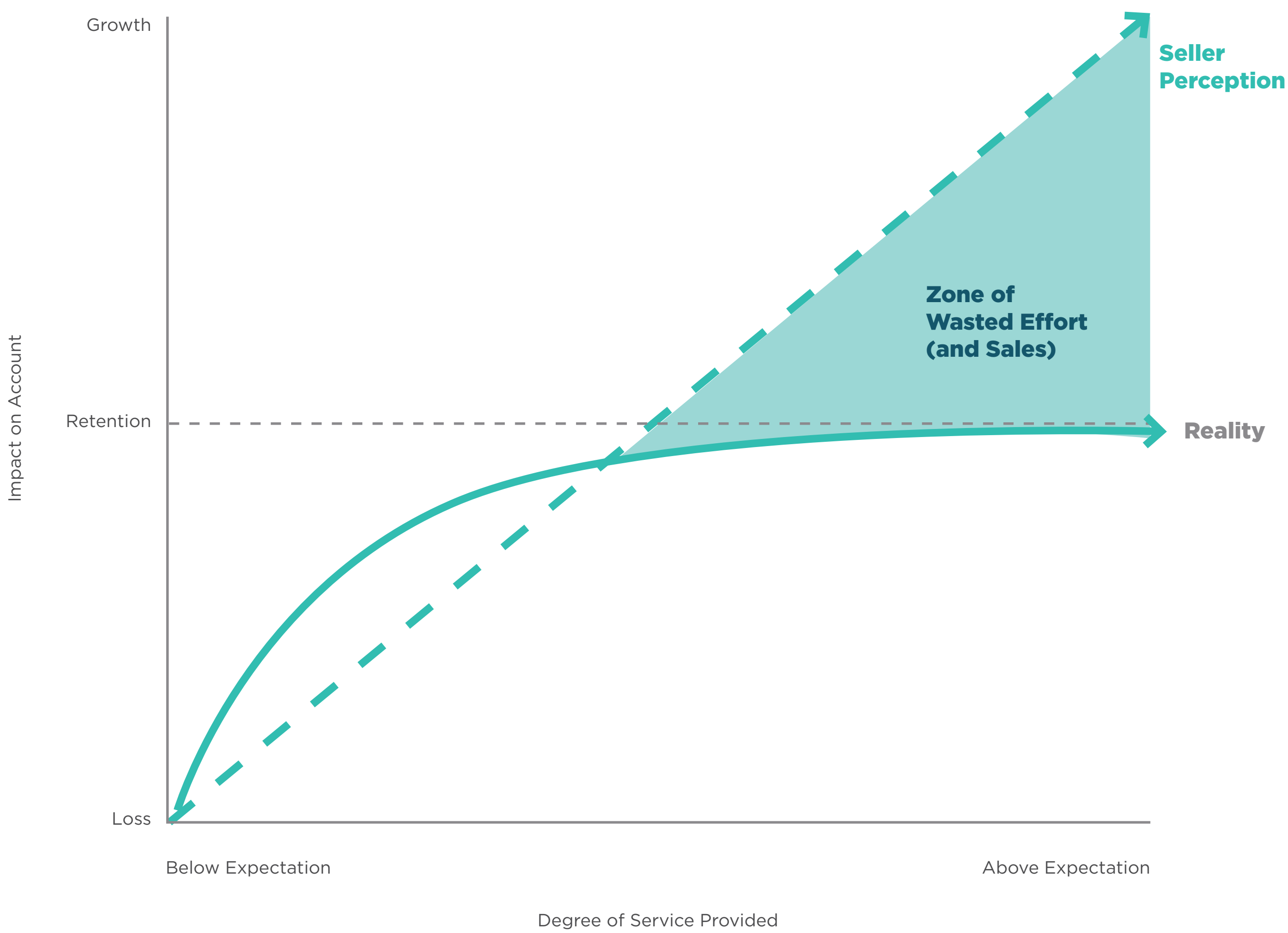
The vast majority (88%) of account managers believe that providing above-and-beyond customer service is the surest way to drive growth. This traditional approach finds sellers focusing almost exclusively on retention activities, working to exceed expectations in a well-intentioned effort to earn permission to grow the account and build goodwill that will make the customer more likely to buy more and better products.

In practice, however we found that while high levels of customer service do increase the likelihood of retention, they have no statistical or meaningful effect on growth.

Retention, renewal, and repurchase are about getting customers to commit to the same thing again, whereas account growth involves convincing customers to do things differently by buying new or different products. These are strikingly different conversations.

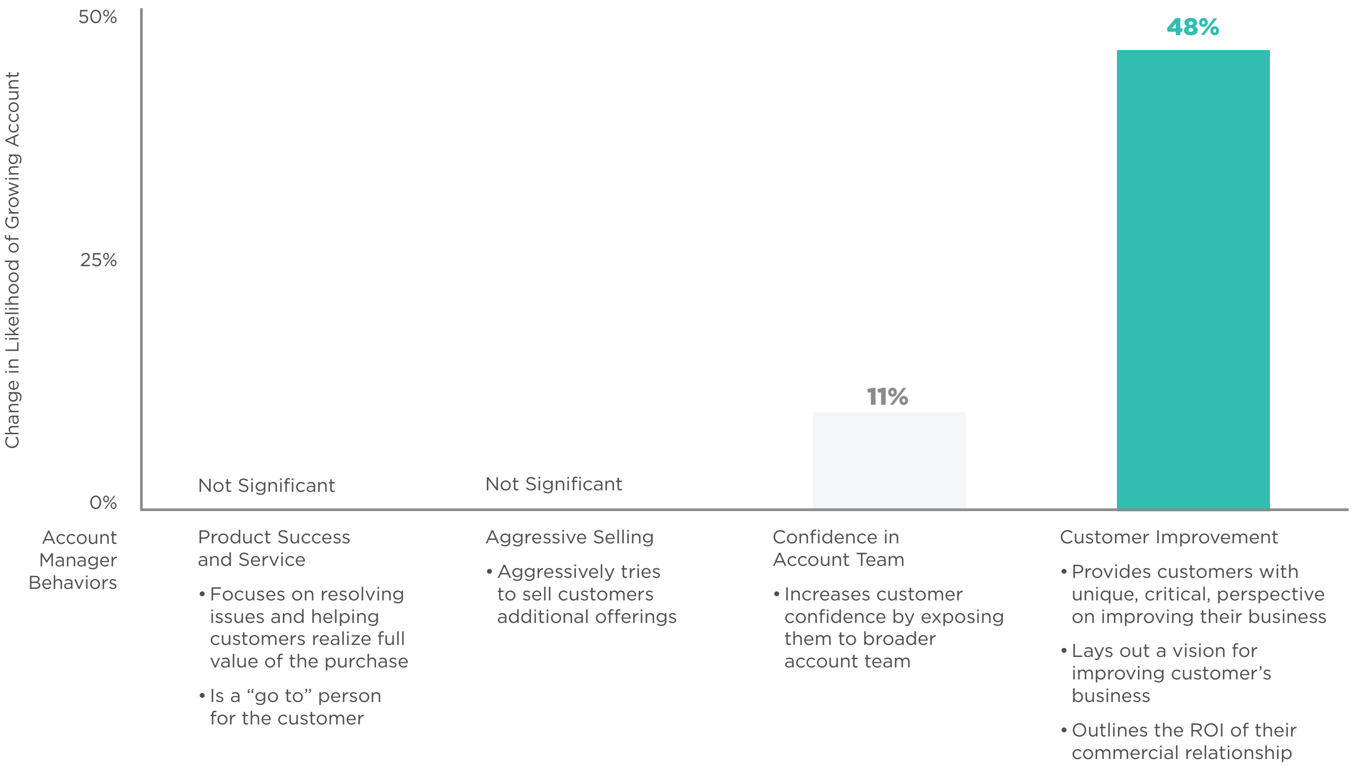
Delivering service and driving growth are not the same thing. Prioritizing customer service after service levels are sufficiently high does not lead to growth but to wasted effort as sellers attempt to deliver ever higher levels of service in pursuit of an illusory goal.

An Anti-Shrinkage Strategy
Illustrative Relationship Between Service and Growth



Source: CEB analysis.

Customer Improvement Drives Growth
Impact of Seller Actions on Likelihood of Growing[a] Account



n = 745.

Source: CEB analysis.

[a] Growing account is defined as either 1) the customer purchased incremental product/service and/or 2) the customer purchased unrelated but net-new products or services and/or 3) the customer upgraded an existing product or service.

The Path to Growth

Instead of focusing endlessly on service, leading account managers grow accounts by helping their customers understand how to improve their business in ways they don't fully appreciate on their own.

This set of activities, called "customer improvement" is the single largest driver of account growth. It requires that account managers provide a unique and constructively critical perspective on how the customer and supplier organization can grow their business together. While traditional retention strategies focus on the supplier and the past, customer improvement requires a clear focus on the customer and the future.

Customer improvement is also nearly as effective as product success and service at driving account retention. Far from undermining renewal efforts, customer improvement gives customers a powerful reason to continue—and expand—their commercial relationship with the incumbent supplier.

Move from Insight to Action

Achieve growth within existing accounts with these resources.

- Why Accounts Aren't Growing, and What to Do About It
- Top Tips to Drive Growth Through Smarter Account Management

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Accelerate Marketing's Digital Proficiency

◆ Challenge

While Marketing leaders try and align their digital marketing efforts with B2B buyer behavior, few have made changes to their mind-sets and day-to-day operations to keep up with customers who use digital channels at every stage of the purchase journey.

◆ Typical Approach

Many Marketing leaders approach digital capability building as a series of one-off projects, hiring specialist roles and building out individual channel presence in an effort to drive activity metrics (e.g., website traffic) or pipeline metrics (e.g., lead volume). Unfortunately, this fragmented approach can result in Marketing spending a lot but seeing little in the way of returns.

◆ Best Practice Solution

Leading marketers have constructed a fully integrated digital marketing "system," based on customers' digital buying behavior. These companies appreciate that the best way to accelerate digital proficiency is to understand how customers use online information and use that knowledge to focus Marketing's effort on the highest-potential initiatives.

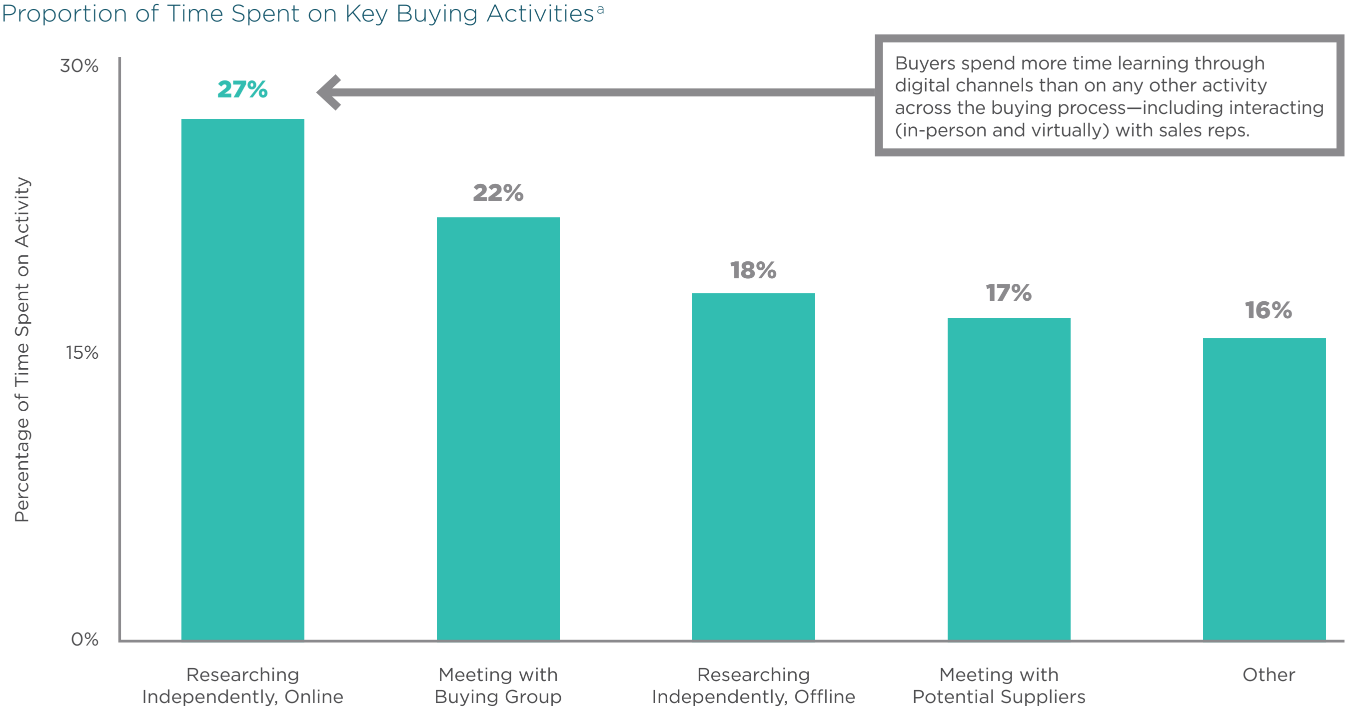
A Changing Commercial Playbook

The digital age has empowered B2B buyers by providing them with greater access to information. Customers today spend more time independently learning through digital channels than on any other activity—including time spent with all supplier reps—across the buying process.

In recognition of this evolving B2B buying behavior, Marketing leaders must build digital marketing systems that focus on customers' digital channel usage and needs at every stage of the purchase journey.

The Top Buying Activity

Proportion of Time Spent on Key Buying Activities[a]



n = 750 B2B buyers.

Source: CEB 2017 Digital B2B Buyer Survey.

[a] Mean percentage of time spent on each activity.

Digital Marketing and the Buying Journey

Customers use digital information at every stage of the buying journey, yet marketing content on digital channels often emphasizes the early portions of the journey in anticipation of a handoff to Sales.

Indeed, the vast majority of customers (89%) continue to turn to digital information channels to complete independent research in the final stages of their buying journey—even after initiating a commercial dialogue with Sales.

It is therefore imperative for Marketing to apply a customer-driven approach to digital, putting aside the traditional "handoff" of a customer to Sales and instead supporting the entire customer purchase journey, independent of when the first conversation with Sales occurs.

Digital Marketing Maturity

As marketers adapt to today's B2B buyer, they are investing in their digital marketing capabilities. We found three distinct levels of digital marketing maturity. Digital Exploration includes marketers just starting out on their digital journey. Those in Active Transition have made investments in supporting technologies or new staff members and have started to build a more cohesive digital capability, but may not have seen significant returns from those efforts. The Digitally Proficient are those rare few organizations with fully integrated digital marketing systems aligned closely to customers' digital buying behavior.

Accelerate the Transition

Leading organizations have reached digital proficiency by:

- Focusing digital initiatives on driving a short set of commercially important customer buying behaviors, and
- Speeding transition progress by:
  - Using iterative learning to constantly course correct system performance,
  - Boosting team-wide digital IQ to improve collaboration, and
  - Expanding their digital ecosystem with "free" capacity.

Three Levels of Digital Marketing Maturity

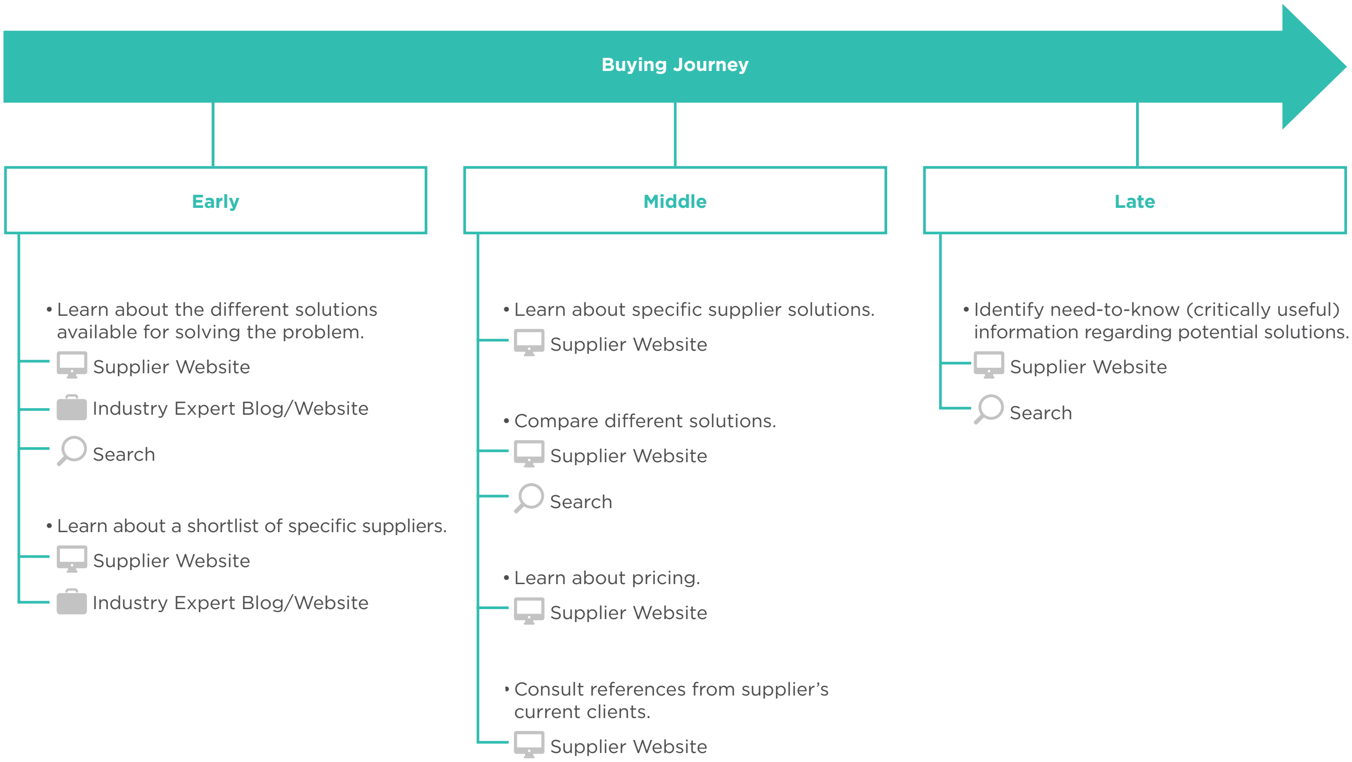
Key Attributes of Digital Marketing Maturity

		I. Digital Exploration	II. Active Transition	III. Digital Proficiency
Intent	Digital Marketing Goal	Increase volume of marketing activity. **Metrics** • Amount of content deployed • Customer activity levels (e.g., clicks and shares)	Boost ability to deliver qualified opportunities to Sales. **Metrics** • Number of qualified leads • Sales acceptance of qualified leads	Guide customer buying behaviors. **Metrics** • Deal cycle time • Number of customers following desired digital paths
Execution	Digital Talent Management	Expertise concentrated in specialist roles	Expertise often centralized in digital teams or centers of excellence	Baseline level of digital fluency expected of entire team
	Technology Management	Exploration of stand-alone technologies	Rapid expansion of martech portfolio	Rigorous evaluation of martech stack's ability to build customer buying momentum
	Process Management	Digital initiatives are additive to existing processes. **Posture:** What can we start doing?	Digital initiatives displace or revise existing processes. **Posture:** What can we stop doing?	Constant scanning across digital initiatives reveals continuous improvement opportunities. **Posture:** What can we do differently?

Source: CEB analysis.

Digital Channels for Critical Tasks

Most Commonly Used Channels for Digital Tasks



Source: CEB 2017 Digital B2B Buyer Survey.

Focus Marketing Effort

Align to Digital Buying Behavior—Achieving digital proficiency requires prioritizing initiatives that improve the buying experience. Leading marketers achieve this by aligning key digital initiatives to a comprehensive understanding of how their customers use digital channels across the buying journey.

Identify Highest-Value Digital Initiatives—Digital transition success hinges on Marketing's ability to focus on the initiatives most likely to deliver the highest value for investments of time and money. Our survey of B2B buyers indicates that for marketers just beginning their transition, a focus on improving website design may yield most value, ensuring customers are led intuitively to the answers they seek throughout their buying journey.

Speed Progress

Streamline Collaboration—Digital marketing is a team sport and requires effective collaboration to manage the many different moving pieces, including changes to technology, talent, and process. A baseline of digital savviness across the entire Marketing team, creates a common language and ensures Marketing teams can collaborate more effectively across the digital divide.

Test Drive Digital Investments—The acquisition and implementation of marketing talent and technologies is one of the most costly aspects of a digital marketing transition. To reduce risk and manage acquisition costs, marketers should carefully consider how a technology will advance a critical capability need and how to test drive planned investments.

Move from Insight to Action

Achieve a fully-integrated digital marketing system.

- Accelerate Marketing's Digital Proficiency with this Plan on a Page Template

Contact us to get started.
topinsights@gartner.com

Communications

Winning Preference through the Corporate Brand

◆ Challenge

Corporate brands that connect with audiences can generate significant business value for organizations, but unfortunately only about one in four are seen as truly unique.

◆ Typical Approach

Many companies try to create this brand connection through an "authentic values" approach. These companies focus brand messaging on demonstrating deeply held company values and beliefs that they share with their audience.

◆ Best Practice Solution

The most effective brands, however, emphasize "personal benefits," the psychological benefits stakeholders get as a result of choosing to associate with that company, not shared values.

Corporate Brand Connection Drives Significant Business Value

Companies whose stakeholders have high levels of "brand connection"—a feeling of favorability and sense of attachment to the brand—are much more likely to prefer the company over its competitors.

In order to create this brand connection, most companies focus messaging on the "authentic values" that the company shares with its audience.

While this approach does have some positive impact on brand connection, our research shows that focusing on "personal benefits" is three times more effective at creating a brand connection.

Benefits of High Brand Connection

+39%	Recruits' willingness to switch employers for a flat salary
+40%	Social media users' promotion
+50%	Customers' willingness to pay a premium
+73%	Brand support from the community

n = 1,247.

Source: CEB 2017 Corporate Brand Survey.

Personal Benefits—Not Values—Drive Brand Connection

Rather than emphasizing the values that the company shares with potential purchasers, the personal benefits approach emphasizes what customers get as a result of their choice to associate with that company.

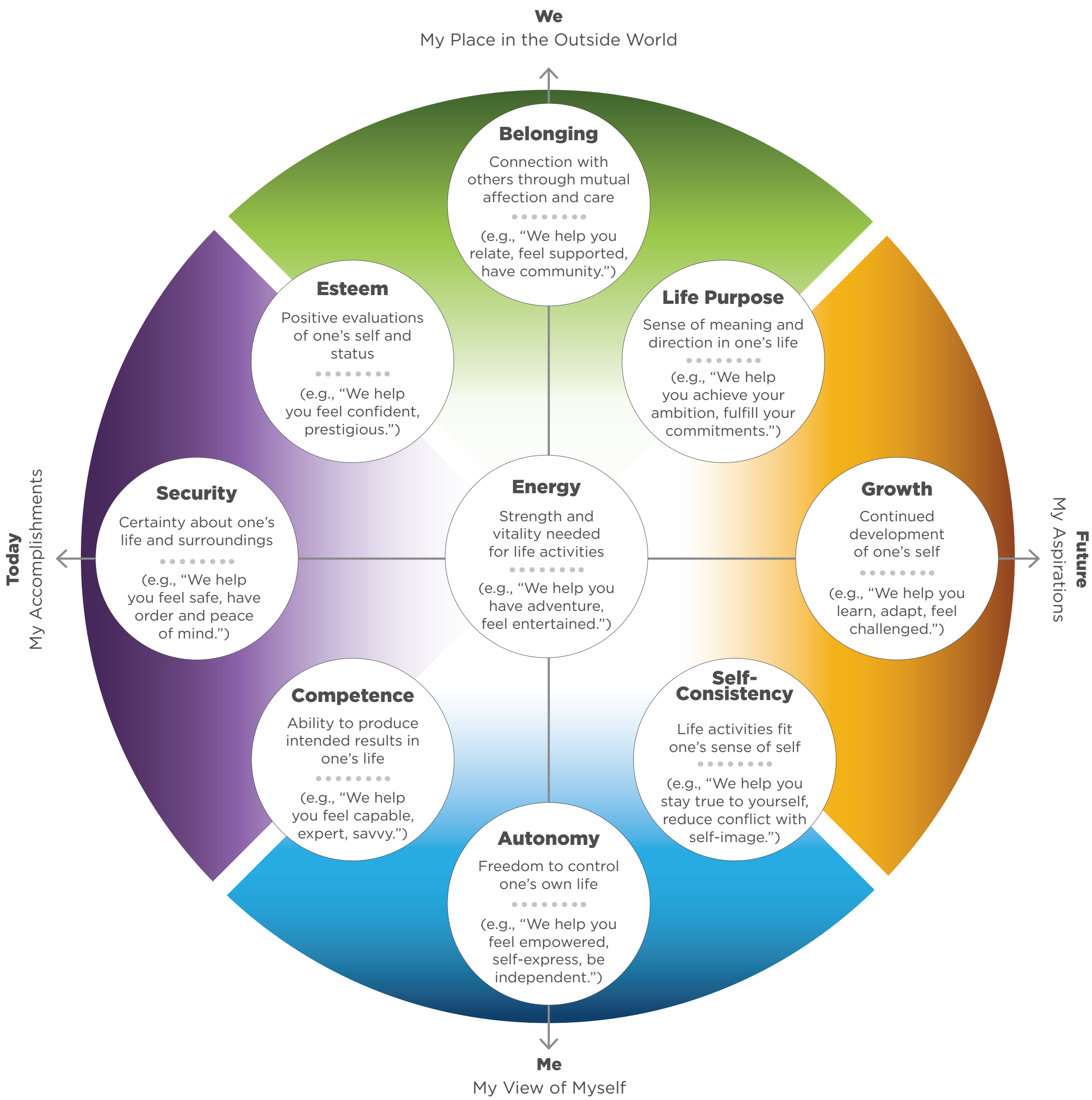
Our research reveals brand connection isn't about how stakeholders feel about a given brand and its values, but rather, how purchasers feel about themselves based on their decision to associate with that brand.

Nine Personal Benefit Categories

While there are potentially hundreds of possible benefits that could influence a customer to prefer a given brand, there are nine dominant categories:

1. **Belonging—**Connection with others through mutual affection and care
2. **Life Purpose—**Sense of meaning and direction in one's life
3. **Growth—**Continued development of oneself
4. **Self-Consistency—**Life activities fit one's sense of self
5. **Autonomy—**Freedom to control one's own life
6. **Energy—**Strength and vitality needed for life activities
7. **Competence—**Ability to produce intended results in one's life
8. **Esteem—**Positive evaluations of oneself and status
9. **Security—**Certainty about one's life and surroundings

Nine Personal Benefits that Drive Brand Preference



Source: Abraham H. Maslow, *Motivation and Personality,* (Harper & Row, 1954); Edward L. Deci and Richard M. Ryan, "The 'What' and 'Why' of Goal Pursuit," *Psychological Inquiry,* Vol. 11, No. 4, 2000; Carol D. Ryff and Corey Lee M. Keyes, "The Structure of Psychological Well-Being Revisited," Journal of Personality and Social Psychology, Vol. 69, No. 4, 1995; CEB analysis.

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Corporate Strategy

Navigating the Digital Transformation

Driving Ambitious Digital Investments

◆ Challenge

The digital investments that companies do make are small and scattered.

◆ Typical Approach

Strategists help senior leaders find "best-fit" digital solutions to specific business challenges, opening their minds to new options.

◆ Best Practice Solution

The best strategists approach their job as "Digital Navigators," focusing the company on the digital options that support its critical strategic objectives, among all the possible alternatives.

Small and Scattered Digital Investments

It's virtually impossible to check a business news site or journal without running into a story about how companies are digitalizing. Most of these investments are, however, small and scattered. A business unit will develop an app because all competitors are doing it; a CEO will assign a "tiger team" to pilot a slightly faster service delivery; or several functions will, separately, invest in big data analytics. About 7 in 10 heads of Strategy report having too few large digital investments (67%) and too few transformational digital investments (71%). This is a mistake.

Thinking Big with Digital Pays Off

Companies that ensure enough resources flow to large and transformational digital investments are seven times more likely to extract value from those investments, and their digital investments are 6.7 times more likely to help them hit five-year revenue goals.

Don't be a Digital Enabler

Strategy should step in to help companies make the right digital investments. One specific (and rare) form of support—the Digital Navigator—is far more effective than the typical "Digital Enabler" approach. Business leaders who aren't getting the Navigator form of support should seek it from their strategy teams.

Strategists that behave as Digital Navigators are four times more likely to get their company to make large and transformational digital investments.

How Navigators Are Different

Digital Navigators are identified by senior leaders through three activities:

- Understanding what is happening in the external environment.
- Identifying the organization's options.
- Determining where the organization should focus its actions.

Where Digital Enablers expose senior leaders to new and emerging technologies, Digital Navigators expose them to digital market shifts.

Where Digital Enablers identify new digital investment opportunities, Digital Navigators test and validate new business models.

Where Digital Enablers show the value (e.g., ROI) of potential digital investments, Digital Navigators demonstrate the shortfall of the existing digital portfolio.

Be a Digital Navigator

Digital Navigators are four times more likely than Digital Enablers to gain sufficient support for large and transformational digital investments. As more parts of the organization increase digital spending, it's imperative strategists manage the proliferation of small and scattershot initiatives by guiding the organization toward digital investments that support critical strategic objectives.

A Fundamentally Different Approach

Strategist Approaches to Driving More Ambitious Digital Investments

	Digital Enablers	Digital Navigators
Sharing with Senior Leaders "What is Happening?"	**Focus on Technology**	**Focus on Market Shifts**
Helping Senior Leaders Understand "What Are Our Options?"	**Identify Investments**	**Test and Validate Business Models**
Helping Senior Leaders Determine "Where Should We Focus Our Action?"	**Demonstrate Value of Potential Digital Investments**	**Demonstrate Gaps in Existing Digital Portfolio**
	Strategy helps determine best-fit digital solutions to specific business challenges by opening people's minds to new options.	Strategy focuses the company on the digital options that support critical strategic objectives, among all that is possible.

Source: CEB analysis.

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Enable your strategists to become Digital Navigators.

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Legal and Compliance

Advancing a Culture of Integrity

Build a Strong Climate by Rethinking Compliance's Role in Culture

Challenge

Despite years of investment, compliance and ethics programs struggle to consistently improve their companies' ethical cultures and reduce misconduct.

Typical Approach

Most programs attempt to improve their ethical culture through a top-down approach, using senior leaders and managers to cascade messages and training to employees. But this approach fails to account for how ethical decisions (and actions) occur in practice, and often falls flat.

Best Practice Solution

Leading programs shift their focus from trying to drive awareness and belief in their cultural values, and instead focus on establishing positive team climates that allow cultural values to be reinforced through daily interactions, and ultimately take root.

The Value of a Strong Culture

Given a recent slew of high-profile cultural failures, it is no surprise that building a culture of integrity has been the most frequently cited goal of compliance and ethics executives since 2010. Our research shows that maintaining a strong culture of integrity substantially decreases observed misconduct and improves reporting rates, as well as improving overall business performance. Companies with strong cultures show a 10-year total shareholder return three times that of companies with weak cultures.

In addition, employees in strong cultures are:

- Two to three times more likely to overperform on individual and team goals,
- 90% less likely to observe misconduct, and
- 1.5 times more likely to report misconduct when observed.

Not Making Much of a Dent

Despite the substantial increase in resources and attention devoted to culture, research has found only a 1% increase in the average employee's perception of culture in the last eight years. Simply put, corporate compliance and ethics programs have not made substantial progress in convincing employees that their companies act with a high level of integrity.

There Is a Big Gap in Perceptions of Culture

In general, about half of employees believe their senior leaders behave with integrity, and slightly more have good perceptions of their direct managers. Shockingly, only a quarter of employees believe their teammates and colleagues engage in and model the right ethical behaviors. These are the people who they work with, talk to, and see daily—and often the people they actually observe doing good or bad things. In fact, what an employees' colleagues say and do has a significant impact on their perceptions of culture.

Specifically, the climate an employee works in—the practices and procedures employees follow and the behaviors they see being rewarded and supported—account for 57% of the variation of culture. This means that climate is the difference between strong and weak cultures. When employees work in strong climates, cultural perceptions are amplified by the signals employees receive and the behaviors they see around them, with 88% of employees in strong climates having strong perceptions of their company's culture of integrity. In fact, an employee's perceptions of his or her climate has an impact on their culture of integrity that is seven times greater than the next most important driver.

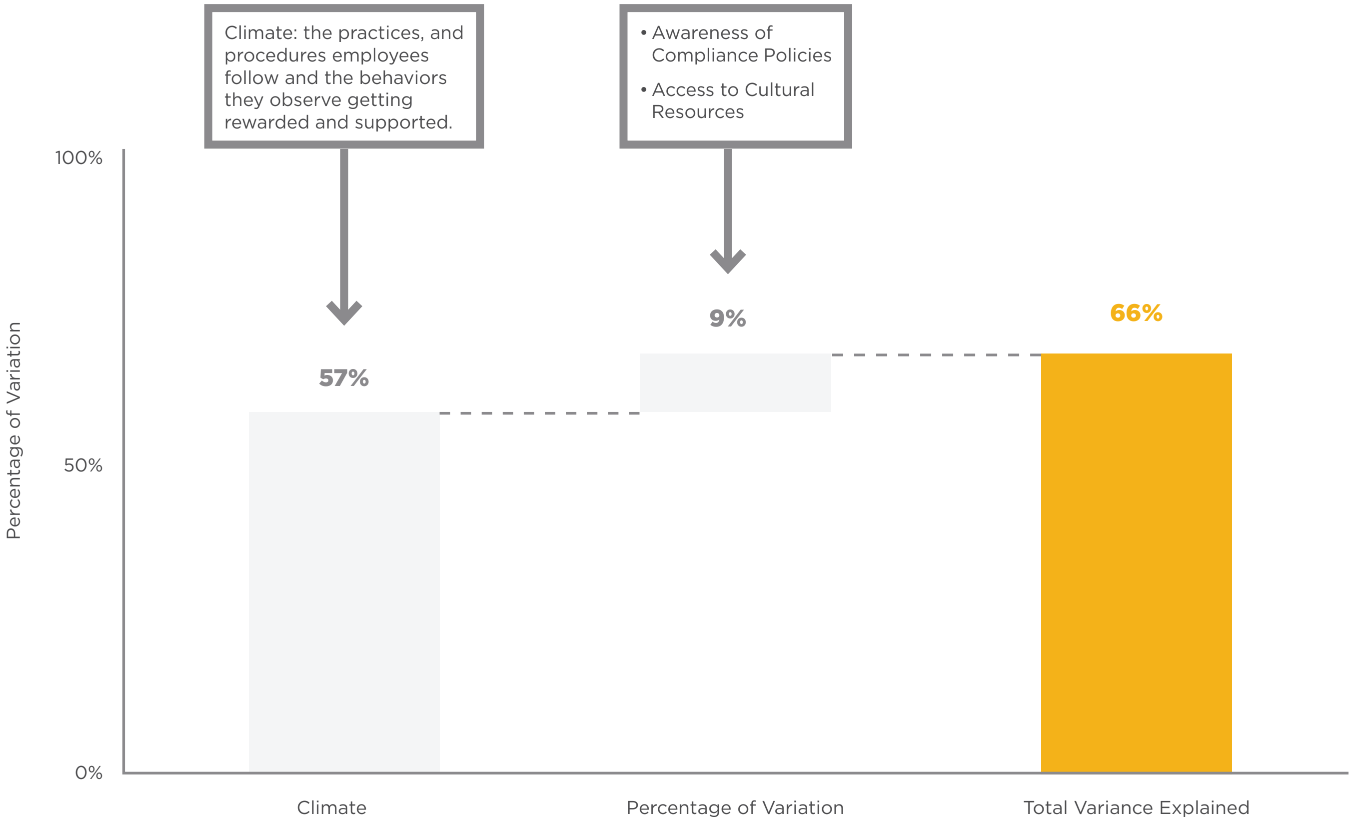
How to Build Strong Climates

Without a strong climate, much of the work to improve culture is wasted. Unfortunately, this is far too often the case—our research indicates that 71% of employees work in weak climates.

To build stronger climates, compliance and ethics programs must do three things:

- Help employees exhibit good behaviors in their work.
- Ensure managers send consistent messages.
- Make colleagues' positive behaviors more visible.

Impact of Drivers Tested on Employee Perceptions of Culture
Demonstrated by the Percentage of Variation in Culture They Explain[a]



Variables without a significant impact on culture include: Awareness of Company Values, Belief in Company's Values, Emotional Commitment to Culture, Self Interest in Culture, Cultural Training, Perceptions of Cultural Risk, Prior Cultural Experiences, and Burden of Exhibiting Positive Behaviors.

n = 5,025.
Source: CEB Compliance and Ethics 2017 Global Culture Assessment.
[a] Adjusted r^2 = 0.66.

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Build a culture of integrity at your organization with these resources.

- How Corporate Culture Affects the Enterprise
- Global Trends in Misconduct
- Reduce Risk by Encouraging Communication

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Risk and Audit

Advancing Quality and Audit Analytics

Focus Your Investments on Staff Enablement to Successfully Deliver Analytic Insight

◆ Challenge

Quality and Audit departments must move rapidly to keep up with the volume of—and business demand for—data.

◆ Typical Approach

Many companies make investments in technology and focus on the state of the data.

◆ Best Practice Solution

The most effective companies focus instead on attaining a high "Insight IQ," comprised of data attainability, usefulness, and staff capability to make faster decisions and bolder, more confident bets.

From Rhetoric to Reality

The era of the truly digital business is at hand. Corporate and support functions have reams of new data available, and they recognize that their role is to find insight in that data.

This means investing in analytics skill development—learning how to investigate data sources, challenge assumptions, and identify what matters from the data—as well as clarifying the scope and delivery of analytic initiatives and establishing strong data governance.

Quality and Audit departments in particular are making analytics a primary focus.

- More than 75% of Quality staff report that analytics is a significant or core aspect of their jobs.
- More than two-thirds of Audit teams are planning to increase their use of analytics across all phases of audit engagements, as well as in risk assessment and audit planning.

A Wasted Investment

Though analytics is a smart priority, few Quality and Audit leaders are seeing returns.

- Many Quality leaders focus on increasing access to data and technical skills training, but neither effort has had a material impact on Quality effectiveness.
- Investments in data access have reached a tipping point: any further spend by Quality on access won't yield results.
- Virtually all (98%) of Audit departments have recently made at least one investment in analytics technology, with an average annual spend of US$100,000. But only 26% use analytics routinely, and even fewer (16%) are making substantial progress toward their goals.

Focus On What Matters Most

Analytics doesn't begin with technology, which would be too costly. And it isn't all about building perfect datasets—that's just a fantasy.

In fact, the greatest opportunity for analytic impact lies in harvesting insight from your unstructured data.

To avoid squandering money and effort, the best departments focus on setting staff up for success.

They are tackling often-overlooked tasks to increase Insight IQ:

- Getting employees comfortable working with imperfect data, and
- Integrating analytics into existing workflows.

The Payoff

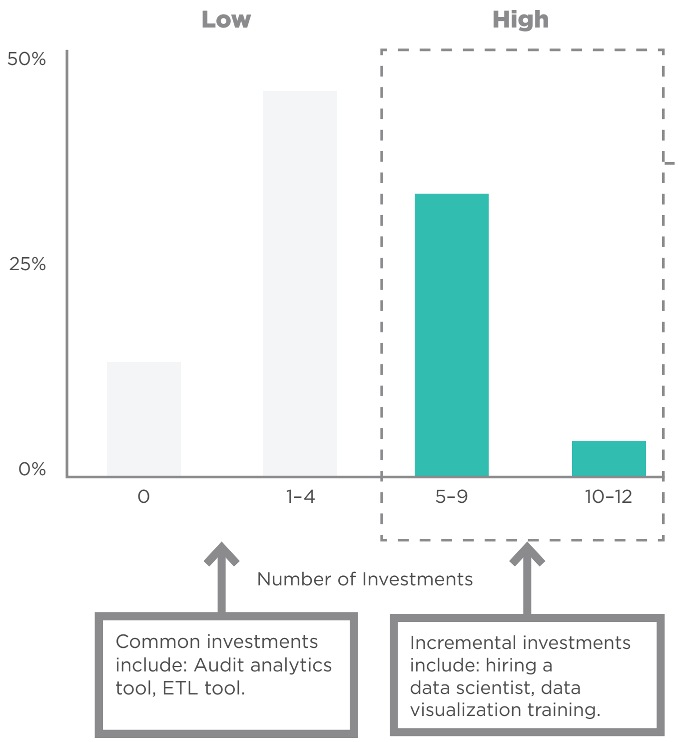
While developing your staff's analytic skill has an impact on Quality effectiveness, the encouraging staff to use analytics has far greater benefit.

Quality employees who build what we call "analytic comfort"—the ability to use data (even if it's unstructured) to spot trends and generate and effectively communicate insight—achieve better outcomes, such as:

- 9% reduction in the frequency of recurring quality errors, and
- 30 fewer days to complete an investigation.

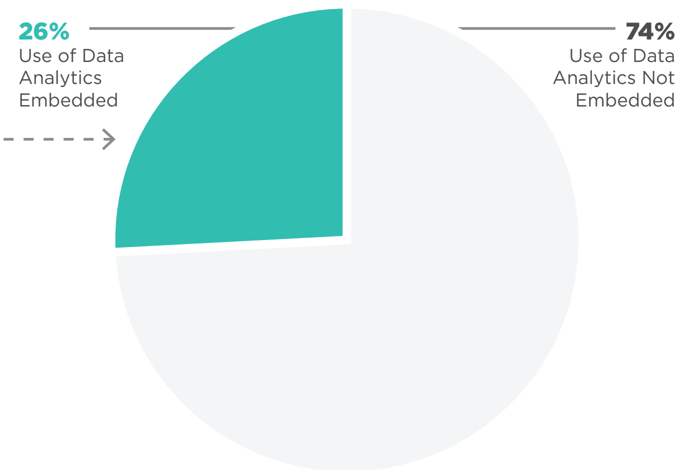
Similarly, Audit departments that update (not overhaul) their processes and methodologies to account for analytics at key points double their chance of success. In fact, our research shows that Audit is four times more likely to use analytics consistently by adapting and/or resequencing workflows than by investing further in technology, staff skills, or access to data.

Number of Investments in Data Analytics Made More Than 12 Months Ago
Percentage of Audit Departments



n = 232.
Source: CEB 2017 Data Analytics in Audit Benchmark.

Performance of Audit Departments Making Significant Investments[1] in Data Analytics
Percentage of Audit Departments



n = 95.
Source: CEB 2017 Data Analytics in Audit Benchmark.
[1] More than the median number of investments (4).

We have made all these investments in software and tools, but we are still struggling to get auditors to use data analytics.

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To Build Employees' Analytic Comfort:

- Teach staff how and when to use different types of data,
- Clarify when to prioritize analytic precision and when to prioritize timeliness,
- Make failure an option, and
- Encourage creativity.

To Successfully Integrate Analytics:

- Update the department's methodologies and processes to facilitate the use of analytics in workflows
- Reinforce the importance of these changes through guidance and prompts from the department head, managers, and peers

Move from Insight to Action

Achieve a high Insight IQ.

- Learn How to Successfully Integrate Your Analytics Program with This Checklist

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Finance

A New Playbook for Growth Investment

Shift Your Focus to Create an Environment Where Investments Will Succeed

◆ Challenge

To achieve "Efficient Growth," CFOs need to produce outsized returns from their major growth investments, but investments are twice as likely to miss expectations than to exceed them.

◆ Typical Approach

Many companies focus on minimizing misses.

◆ Best Practice Solution

Progressive companies create an environment in which investments will succeed. These "Efficient Growers" exceed expectations by making risk identification a bigger part of evaluating business cases and by making funding for "likely to exceed" growth investments more flexible.

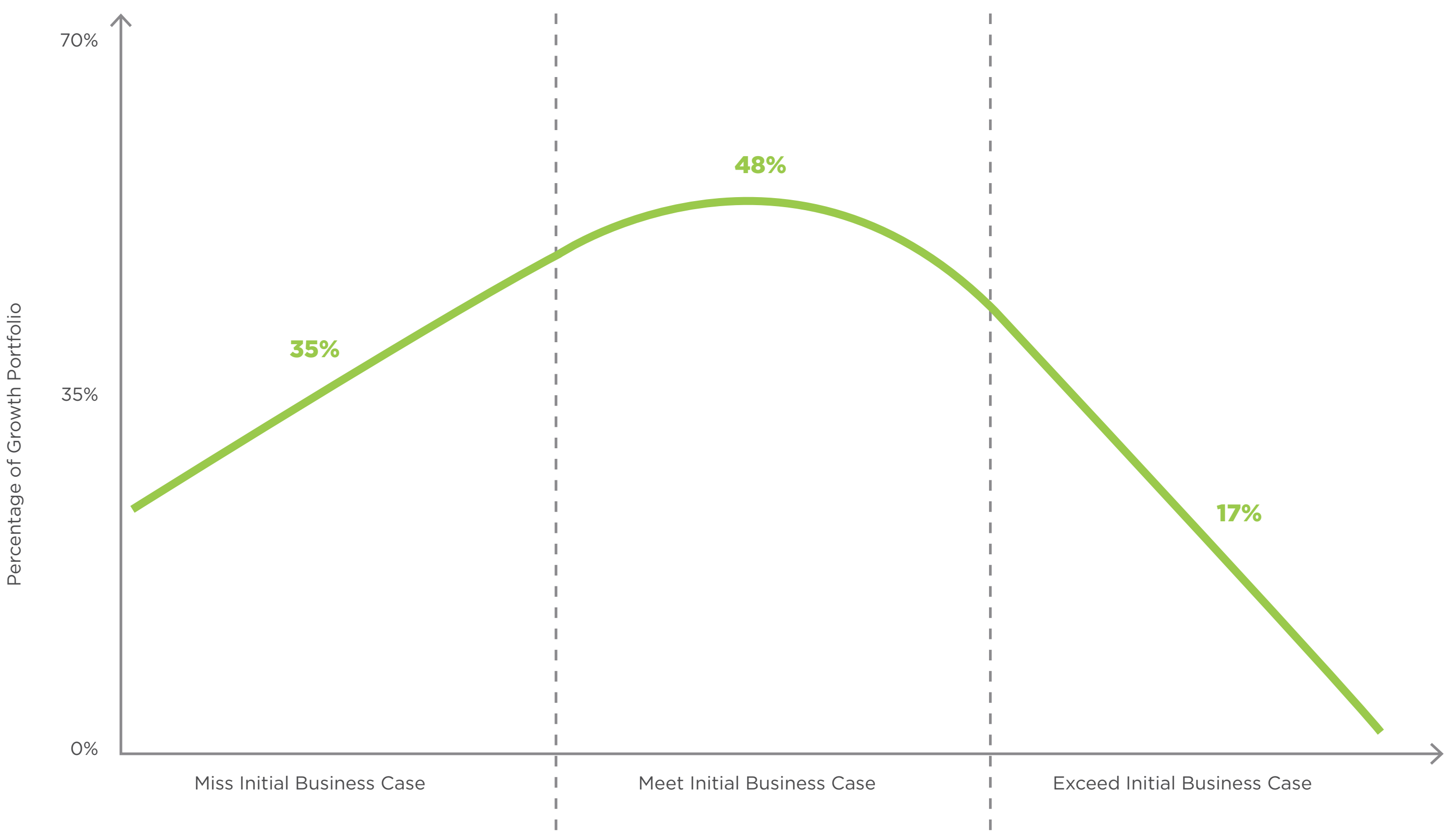
Falling Short of Expectations

Weak emerging markets, a strong dollar, regulatory uncertainty, and investor activism have combined to make three in every four management teams more risk averse. Yet the CFO's number one mandate remains Efficient Growth.

In response, CFOs are focused on driving outsized returns from their major growth investments—for example, launching a new brand or technology, or expanding production or customer service capacity. But selecting which bets to pursue and creating an environment where they can succeed is extremely difficult. Most investments miss on internal rate of return (IRR), leading the average company to sacrifice 200 basis points of growth each year. In fact, investments are approximately twice as likely to miss initial expectations as they are to exceed them.

Average Distribution of Growth Investment Performance

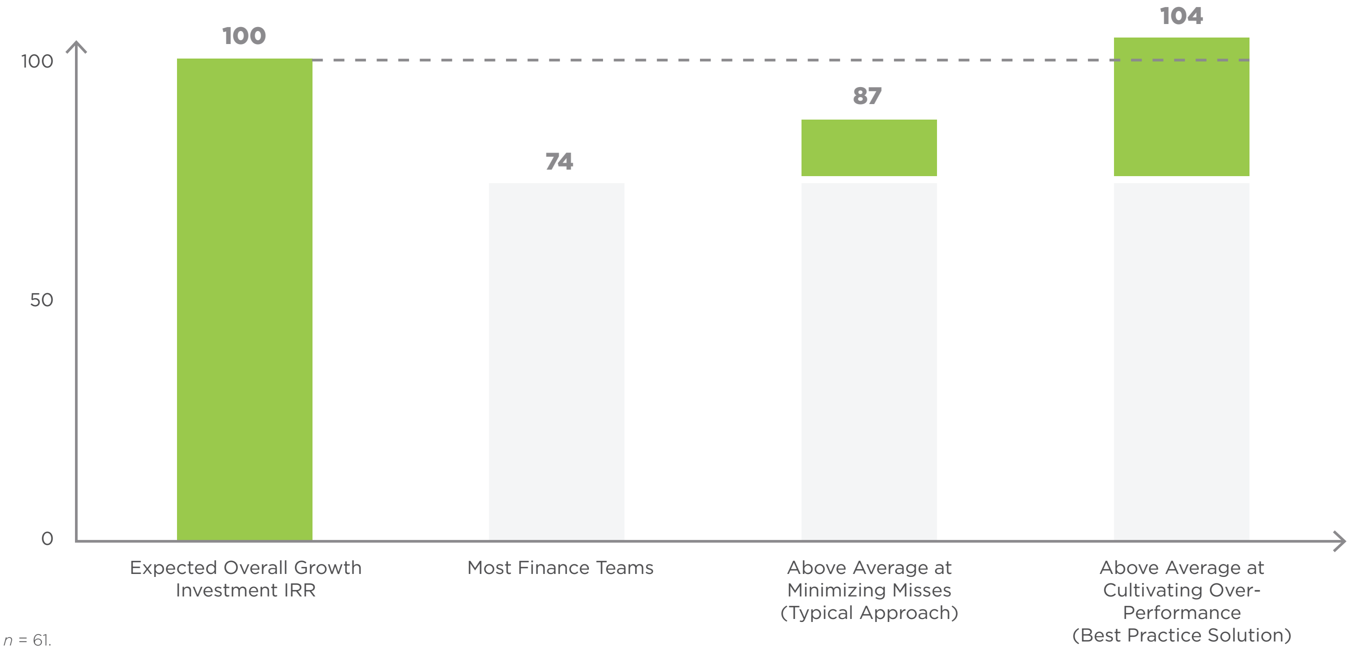
Percentage of Investments Missing, Meeting, and Exceeding Initial Business Case Expectation



n = 61.

Source: CEB analysis.

Overall Growth Investment Performance Relative to IRR Expectations
Indexed to 100



n = 61.
Source: CEB analysis.

A Broken Playbook

Most Finance teams try to minimize the number of investments that miss their initial expectations. In other words, they spend most of their time evaluating the upfront business case to make sure the organization bets on "the right horse(s)".

However, even the companies that are above average at minimizing misses still sacrifice 100 basis points of growth each year.

What We Found: The Best Finance Teams Focus on Overperformance

Efficient Growers do not have a materially lower percent of failed investments: to realize the full potential of growth investments, they focus on creating an environment in which investments exceed expectations. They do this by:

- Identifying when funding should be adjusted,
- Reserving funds to boost attractive, in-progress investments, and
- Minimizing resource interdependencies between projects in the portfolio.

Achieve desired returns on growth investments by upgrading your approach:

- Make risk identification a bigger part of evaluating business cases; and
- Make funding for "likely to exceed" growth investments more flexible.

Move from Insight to Action

Close the growth investment return gap with these resources

- Identify How the Best Finance Teams Drive Efficient Growth
- Assess Readiness for an Economic Slowdown with This Checklist
- Seven Tactics for Better Capital Allocation

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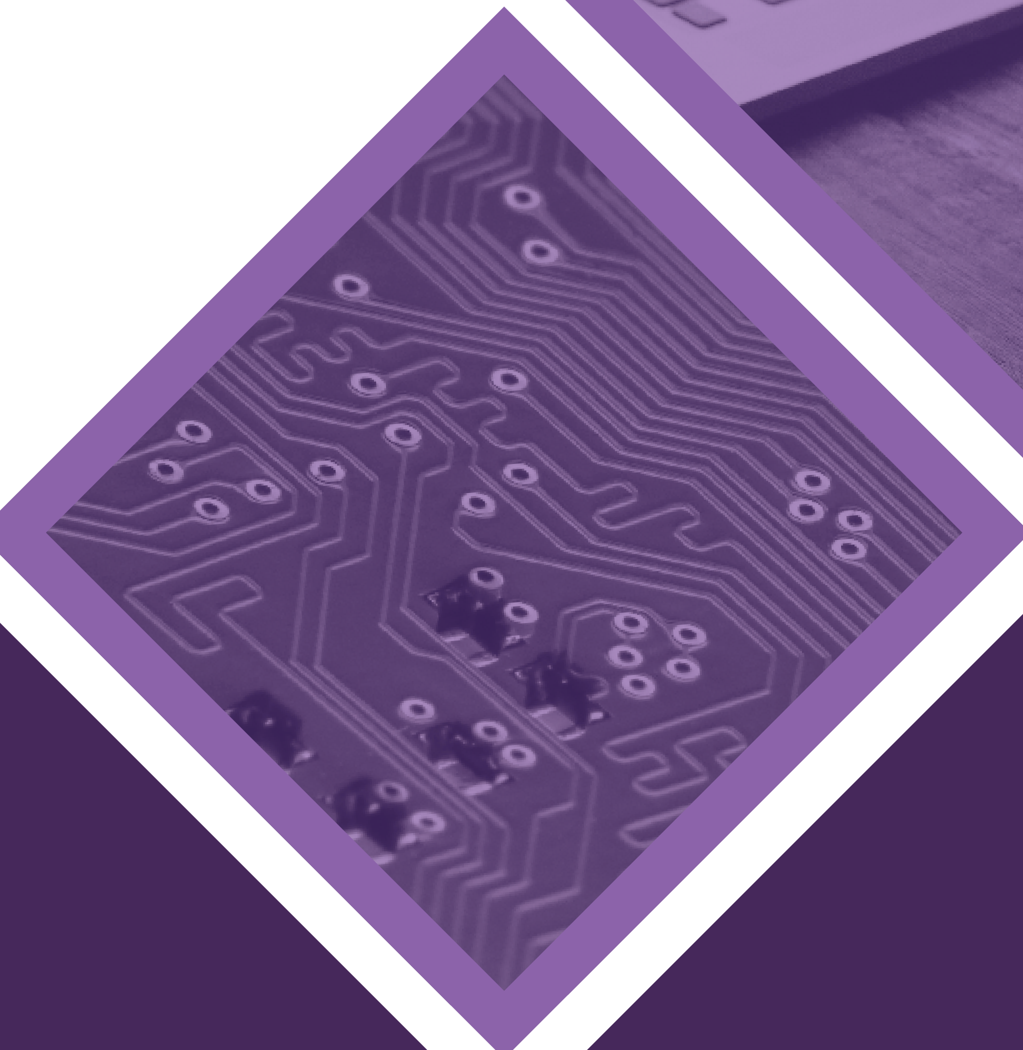


Information Technology

Evolve IT Leadership for the Digital Age

◆ Challenge

IT leaders face new challenges and opportunities from digitalization. Rapid changes in technology and the volume of disruption, plus business leaders' growing influence on IT decisions, exacerbate the need for a change in leadership styles.

◆ What To Know

Digitalization enables IT leaders to envision new business models and opportunities that can lead stakeholders through deep cultural change.

◆ What To Do

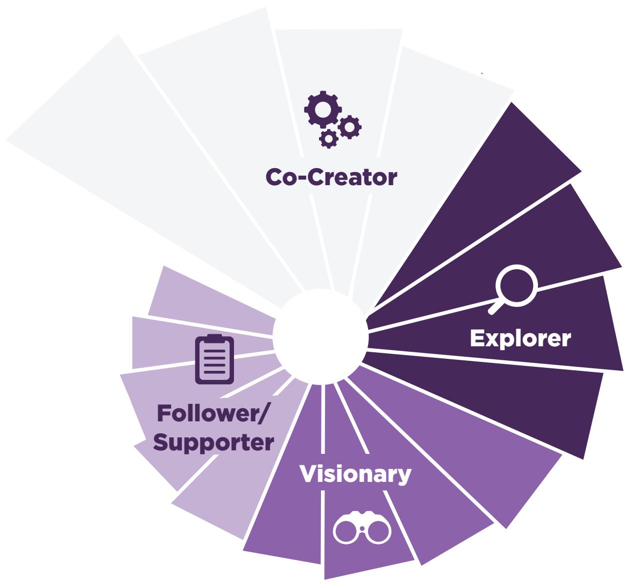
Today, 40% of technology spending is not by IT. CIOs must move from a separate IT strategy that reacts to the business strategy, to a proactive approach that guides the use of IT across the enterprise.

> **Leadership in the digital age is about preparing you and your team to assume situational, competency-based leadership roles, and developing a culture of trust, purpose, engagement, commitment, and collaboration.**
>
> Alvaro Mello
> Managing VP, Gartner, Inc.

The Evolution of the CIO Role

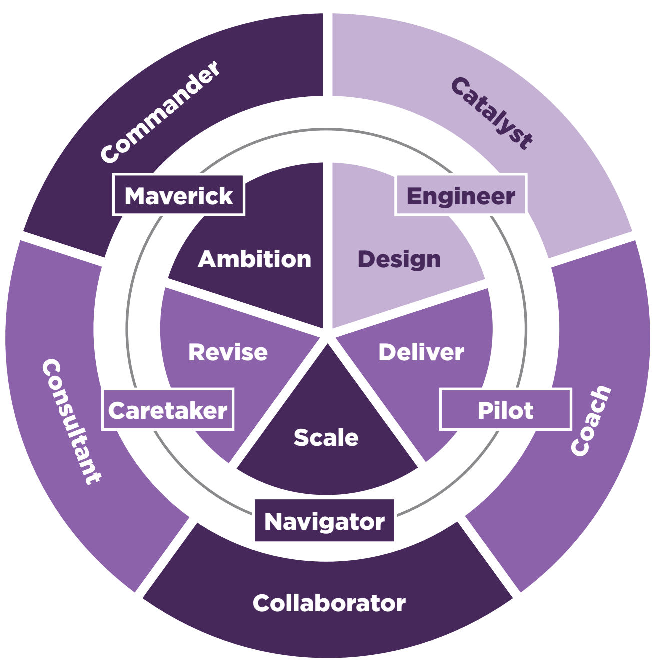
CIOs must become technology-savvy business leaders, much more than business-savvy technology leaders. They can no longer just follow and support the business. Most companies do not know where to go next, or what is coming, or even who they are competing with. Since technology drives this disruption and uncertainty, IT leaders must step up to guide their organizations. But that means evolving from follower and supporter to visionary, explorer and co-creator.

CIOs and IT Leaders Evolve from Supporters to Co-Creators



Source: Gartner, "Leadership in the Digital Age: A Gartner Trend Insight Report," 26 May 2017; CEB analysis.

CIOs and IT Leaders Evolve From Supporters to Co-Creators



Source: Gartner, "Five Situational Leadership Types for CIOs Working With Digital Teams," 11 May 2017; CEB analysis.

Leadership Styles

The digital world requires CIO leadership that goes beyond simply communicating with executives and working with peers. Leaders must learn new ways to respond to direct reports, their teams, and dynamic groups of business partners across digital initiatives. There are five key roles CIOs must be prepared to play:

- Commander
  - Focuses on the goal
  - Provides the direction, objectives, rewards and pace
  - Delegates decisions and actions for execution
  - Most effective with experienced, self-managing teams
- Catalyst
  - Focuses on initiating action
  - Provides frameworks for innovation
  - Instigates and motivates the team to generate creative options
  - Most effective with entrepreneurial and innovation teams
- Coach
  - Focuses on performance
  - Provides real-time feedback to improve skills and change immediate execution
  - Guides and directs team members
  - Most effective with operational and action-oriented teams
- Collaborator
  - Focuses on execution
  - Provides direct involvement and hands-on support
  - Supports and models best practices
  - Most effective with new, learning or inexperienced teams
- Consultant
  - Focuses on outcomes
  - Provides experience, insight and knowledge
  - Advises and contributes to planning and long-term outcomes
  - Most effective with traditional, conservative or evolving teams

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Adapt Information Security for the Era of Continuous Delivery

◆ **Challenge**

IT organizations are moving to continuous delivery to meet new speed-to-market expectations but Security's existing practices are not structured to support faster delivery. This means that either applications go into production with vulnerabilities or the company's digitalization efforts risk being outpaced by competitors.

◆ **Typical Approach**

To ensure secure project delivery, most teams focus on training developer teams and implementing project stage-gate reviews. But as the number of projects increases and development becomes more iterative, these traditional approaches become much harder to execute.

◆ **Best Practice Solution**

The best IT organizations adapt their approaches to developer training and project governance. These organizations tailor developer training to make it easy for teams to write secure code. They also look for opportunities to automate and delegate security governance.

> **The best way to drive more secure coding and product development is to make the right way the easy way.**
>
> Alvaro Mello
> Managing VP, Gartner, Inc.

Digitalization Puts IT Leaders Under Increasing Speed Pressure

67% of business leaders believe their companies must pick up the pace of digitalization to stay competitive. To meet these new speed-to-market demands, leading organizations are expanding the use of Agile and DevOps to support continuous solutions delivery.

Traditional Information Security Processes Can't Support Faster IT Delivery

For many IT organizations, continuous delivery has emerged as the project delivery method of choice. Yet Security's existing practices are not structured to support this approach. This exacerbates tensions between Applications and Security, slowing IT delivery.

In particular, three challenges often reduce Security's ability to support continuous delivery:

One-size-fits-all training does not fit developer workflows. As a result, many of these efforts have led to a "check-the-box" attitude among Applications teams, who take but do not internalize security training.

Demand for security far outstrips supply. With Agile, it's more difficult to predict when Security needs to get involved in IT projects. As a result, demand often outstrips Security's capacity.

Waterfall by design. Traditional security governance processes were designed to work in Waterfall environments, with clearly defined and scheduled stage gates. In a continuous delivery environment, these processes can hinder IT delivery speed and create inefficiencies.

In the digitalization age, success or failure depends on achieving both speed and security goals. Organizations need to make governance less time consuming while maintaining rigorous security standards.

Five Ways to Improve Security in the Era of Continuous Delivery

1. **Tailor Developer Training to Address Insecure Behavior**
   Track and analyze developer coding behavior, (e.g., number and types of vulnerabilities, number of policy exceptions; see chart to the right.) Consistent policy violations or exception requests show where Security should revise its policies. In contrast, unique violations show where Security should tailor training to target specific teams of developers.

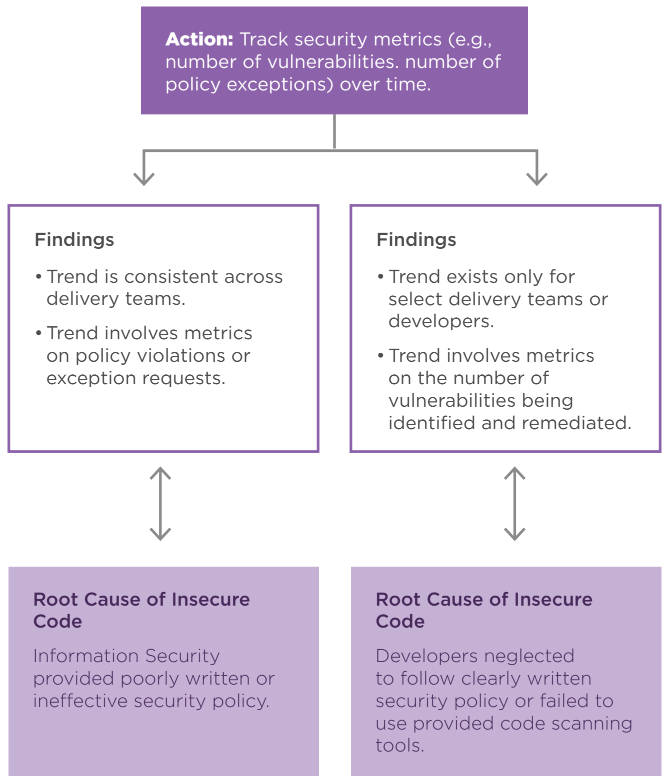
2. **Provide Developer-Friendly, Just-in-Time Guidance**
   Agile offers several ways for Security to give guidance in a way that development teams can easily and quickly digest. For instance, Security can use Agile user stories to communicate security requirements to developers in a user-friendly format.

3. **Teach Developers to Make Secure Project Design Decisions**
   Conduct joint threat-modeling exercises to review high-risk projects while teaching developers about possible vulnerabilities. Teams can use patterns from these exercises to review medium-risk projects. For low-risk projects, delegate reviews to developers with security training.

4. **Share Security Governance Responsibilities**
   Establish a security champions program to share responsibility for manual security tasks. Recruit senior developers to help manage business logic errors or policy exceptions. Sharing these responsibilities increases delivery speed and makes security more scalable. It also reinforces the message that security is everyone's job.

5. **Help Developers Do the Right Thing by Default**
   Offer reusable security functionality (services like encryption or logging exposed through APIs) to reduce the effort required to fulfill security requirements. This helps development teams meet speed-to-market goals and limits project-level governance at the same time.

Identifying Trends in Developer Coding Behavior
Illustrative



Source: CEB analysis.

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Develop Digital Fusion Teams That Are Fast and Right

◆ Challenge

As digitalization becomes central to company strategy and growth, IT teams face rapid change, volatile demand, and blurred organizational boundaries with the rest of the company. To realize the full promise of digitalization, companies must embrace flexible, cross-cutting, highly collaborative ways of working.

◆ Typical Approach

Ninety percent of IT employees participate in flexible “fusion” teams that extend across IT and other parts of the business. Yet, only one in four cross-functional digitalization teams works quickly and seamlessly to deliver business value.

◆ Best Practice Solution

Digital fusion teams have to work and adapt quickly. The best fusion teams succeed through openness, learning agility, commitment to coaching, and strong digital acumen.

> **The promise of fusion teams is broader visibility and learning but the absence of career progression is killing it. People love working on fusion teams, but they can’t see progression outside their existing hierarchies.**
>
> CIO
> Financial Services Company

Fusion Teams: How Digitalization Work Gets Done

IT employees need to collaborate more within and beyond IT to achieve critical digitalization goals. This style of working often results in cross-cutting teams or fusion teams. Ninety percent of IT employees now work on teams that integrate parts of IT that were traditionally distinct. Eighty percent also work on teams with counterparts from other parts of the business, or third parties. Unfortunately, only one in four of these cross-functional digitalization teams work quickly and seamlessly to deliver business value.

How Work in IT is Changing

Yesterday's IT Employee		Today's IT Employee
Assigned to formally chartered projects	→	Contributes to organically formed initiatives
Deep technical expert	→	Business domain expert with technical breadth
Follows defined processes and methodologies	→	Works in new terrains without defined protocols
Engages business partners at distinct project phases	→	Continually collaborates with business employees

Source: CEB analysis.

Four Mind-Set Shifts to Foster Fusion Behaviors

Fusion Behavior	Today's Perception		New Perception
Coaching Commitment	"Success comes from improving my own performance."	→	"Success comes from helping others improve their performance."
Learning Mind-Set	"Success comes from learning skills relevant to my function."	→	"Success comes from learning skills relevant outside my function."
Open Disposition	"Openness is cultural, so it takes years to change."	→	"Leadership behaviors directly affect organizational climate, which in turn affects culture."
Digital Acumen	"Digital acumen is a technical skill."	→	"Digital acumen is a leadership competency."

Source: CEB analysis.

Foster Fusion Behaviors Within Teams

Faced with fast-changing digital opportunities and risks, these teams have to work and adapt quickly. To do so, they rely on four "fusion behaviors:

Coaching Commitment—Fusion team members feel duty bound to coach each other as they develop new areas of expertise.

Learning Mind-Set—Fusion team members collaborate to build expertise in new domains.

Open Disposition—Fusion team members are open to risk, uncertainty, and new ways of working.

Digital Acumen—Fusion team members understand how digitalization affects the wider business context and requires new ways of working.

IT leaders can take practical actions to develop each of these fusion behaviors in employees across IT:

- **Provide Fusion Incentives:** Reinforce shared team outcomes and incentives, and emphasize intrinsic (not financial) rewards for coaching and helping others.
- **Promote Learning Through Talent Mobility:** Emphasize experience-based (not position-based) career paths, to encourage a learning mind-set.
- **Build a Climate of Openness in IT:** Rethink the signals the leadership team sends about risk taking and experimentation.
- **Embed Digital in Leadership Development:** Focus leadership development on understanding what digital means for the company.

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