



Rewriting the rules for the digital age

2017 Deloitte Global Human Capital Trends



Deloitte's Human Capital professionals leverage research, analytics, and industry insights to help design and execute the HR, talent, leadership, organization, and change programs that enable business performance through people performance. Visit the [Human Capital](https://www.deloitte.com) area of www.deloitte.com to learn more.

PREFACE

WELCOME to Deloitte's fifth annual *Global Human Capital Trends* report and survey. This year's report takes stock of the challenges ahead for business and HR leaders in a dramatically changing digital, economic, demographic, and social landscape. In an age of disruption, business and HR leaders are being pressed to rewrite the rules for how they organize, recruit, develop, manage, and engage the 21st-century workforce.

This workforce is changing. It's more digital, more global, diverse, automation-savvy, and social media-proficient. At the same time, business expectations, needs, and demands are evolving faster than ever before. While some view this as a challenge, we see it as an opportunity. An opportunity to reimagine HR, talent, and organizational practices. An opportunity to create platforms, processes, and tools that will continue to evolve and sustain their value over time. An opportunity to take the lead in what will likely be among the most significant changes to the workforce that we have seen.

Hence, our call for new rules for HR in the digital age.

The 2017 report began last summer with us reaching out to hundreds of organizations, academics, and practitioners around the world. This year, it includes a survey of more than 10,000 HR and business leaders across 140 countries. The report reveals how leaders are turning to new organizational models that highlight the networked nature of today's world of work; innovation-based HR platforms; learning and career programs driven by social and cognitive technologies; and employee experience strategies that put the workforce at the center. The report closes with a discussion of the future of work amid the changes being driven by advances in automation and an expanded definition of the workforce.

We are pleased to present this year's *Global Human Capital Trends* report and survey and look forward to your comments. 2017 is positioned to be a year of change as we all manage new levels of transformation and disruption. The only question now is: Are you ready?



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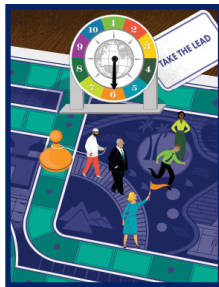
This year's 10 trends

The 2017 Deloitte Global Human Capital Trends report, drawing on a survey of more than 10,000 HR and business leaders globally, takes stock of the challenges ahead for business and HR leaders in a dramatically changing digital, economic, demographic, and social landscape.



THE ORGANIZATION OF THE FUTURE: ARRIVING NOW

As digital transforms the business landscape, the successful organizations of the future will likely be those that can move faster, adapt more quickly, learn more rapidly, and embrace dynamic career demands.



LEADERSHIP DISRUPTED: PUSHING THE BOUNDARIES

Today, many organizations need a completely different kind of leader: a “digital leader” who can build teams, keep people connected and engaged, and drive a culture of innovation, risk tolerance, and continuous improvement.



CAREERS AND LEARNING: REAL TIME, ALL THE TIME

The half-life of skills is rapidly falling, placing huge demands on learning in the digital age. The good news is that an explosion of high-quality content and digital delivery models offers employees ready access to continuous learning.



DIGITAL HR: PLATFORMS, PEOPLE, AND WORK

HR is being pushed to take on a larger role in helping organizations to “be digital,” not just “do digital.” The process starts with digital transformation in HR, as HR leaders explore new technologies, platforms, and ways of working.



TALENT ACQUISITION: ENTER THE COGNITIVE RECRUITER

Recruiting is becoming a digital experience as candidates come to expect convenience and mobile contact. Savvy recruiters now have access to new technologies to forge connections with candidates and strengthen the employment brand.



PEOPLE ANALYTICS: RECALCULATING THE ROUTE

Analytics is no longer about finding interesting information and flagging it for managers. Now, data are being used to understand every part of a business operation, and analytical tools are being embedded into day-to-day decision making.



THE EMPLOYEE EXPERIENCE: CULTURE, ENGAGEMENT, AND BEYOND

Rather than focusing narrowly on engagement and culture, many leading organizations aim to improve the employee experience as a whole, supported by a multitude of pulse feedback tools, wellness and fitness apps, and employee self-service technologies.



DIVERSITY AND INCLUSION: THE REALITY GAP

Diversity and inclusion at the workplace are now CEO-level issues, but they continue to be frustrating and challenging for many companies. Why the gap?



PERFORMANCE MANAGEMENT: PLAY A WINNING HAND

Across industries and geographies, many companies are redesigning performance management from top to bottom, from goal-setting and evaluation to incentives and rewards—and seeing the business benefits.



THE FUTURE OF WORK: THE AUGMENTED WORKFORCE

Paradigm-shifting forces such as cognitive technologies and the open talent economy are reshaping the future workforce, driving many organizations to reconsider how they design jobs, organize work, and plan for future growth.

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TAKE THE LEAD



Leadership disrupted

Pushing the boundaries

Leadership development continues to be a significant challenge for companies around the world, as the transition to the new digital organization creates even larger leadership gaps. High-performing leaders today need different skills and expertise than in generations past, yet most organizations have not moved rapidly enough to develop digital leaders, promote young leaders, and build new leadership models.

- The leadership gap has become larger; organizational capabilities to address leadership dropped by 2 percent.
- Forty-two percent of companies cite “leadership development” as very important.
- The percentage of companies with strong or adequate experiential programs for leaders rose by 2 percent this year.

AS digital disruption sweeps across every major industry, leadership capabilities are not keeping pace. In 2015, we termed leadership the “perennial issue in business”—a challenge that never seems to go away. This year we see a radical shift. Today, as never before, organizations do not just need more strong leaders, they need a completely different kind of leader. In short, organizations need to build a new breed of younger, more agile, “digital-ready” leaders.

Leadership today is less about the “art” of leadership and more about the challenges leaders are facing. Above all, the dramatic transformation of business is driven largely by the switch to digital.

Unfortunately, many CEOs do not understand the gravity of this issue. In a recent industry study of 800 top business executives, 67 percent believed that technology will drive greater value than human capital (and 64 percent believed people are a cost, not a driver of value).¹ While the topic of human

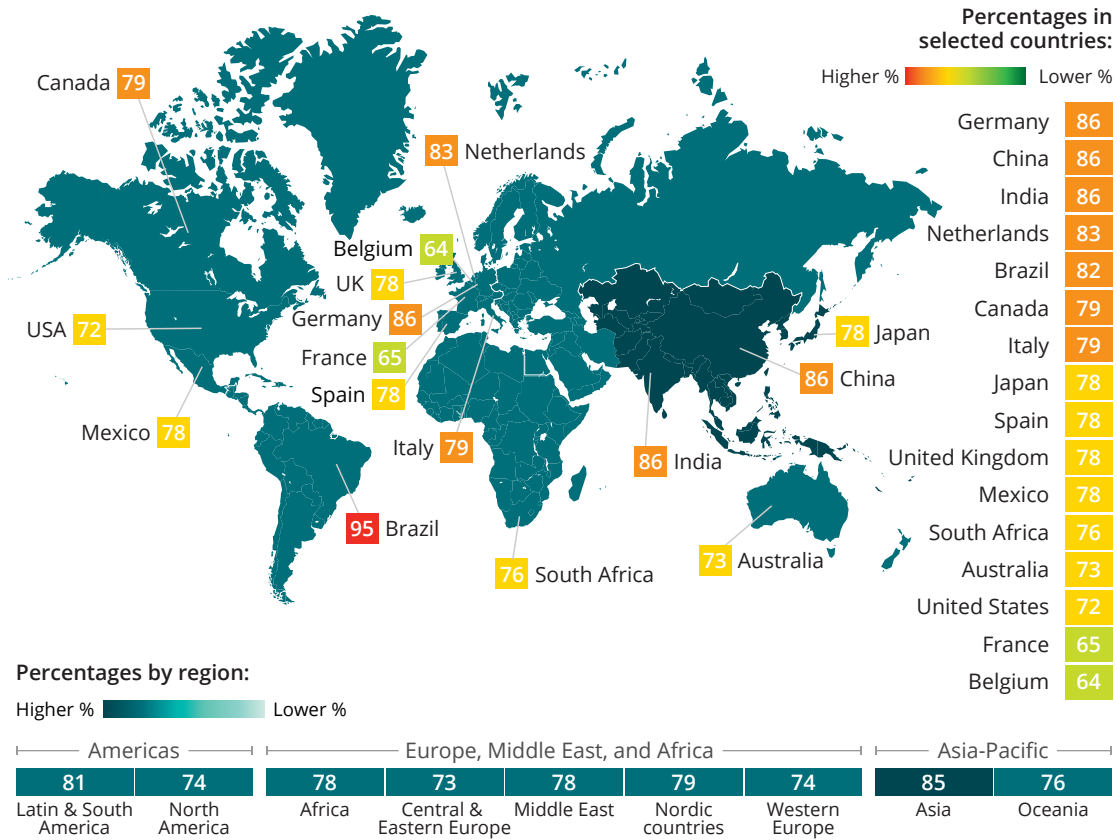
capital vs. technology may be in debate, some executives still continue to focus on the technology side of the business at the expense of developing leaders.

Of course, technology is critically important, but human capital remains indispensable.

However, the concept of “leader as hero” no longer scales. Highly effective companies such as Google, Lyft, WL Gore, Mastercard, and Atlassian look at leadership as a team effort and recruit leaders who can work together, complement each other, and function as a team.²

When older business models are no longer working, leaders need new capabilities. Yet most companies are digital “immigrants,” new to this world and built on older models such as control mechanisms and financial returns. Now, companies are scaling for different goals, such as innovation and moving at high speed. Ninety percent of companies are redesigning their organizations to be more dynamic, team-

Figure 1. Leadership: Percentage of respondents rating this trend “important” or “very important”



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tric, and connected. These changes require not just new operating models, but a different type of leadership to mobilize and execute these models.

Because of these shifts, organizations need people who can lead teams and partner with the broader ecosystems. This new type of leader must understand how to build and lead teams; keep people connected and engaged; and drive a culture of innovation, learning, and continuous improvement. They must also be able to lead a workforce that now includes contractors, the contingent workforce, and crowd talent.

A natural corollary of this is that leaders need interdisciplinary skills. Companies such as GE, IBM, Nestlé, Xerox, and Mastercard now bring leaders together for collaborative design and problem-solving exercises, challenging them to understand how different business functions, industries, and technolo-

gies come together to form solutions. The days of a line leader reaching the executive level in a sole function have ended.³

Perhaps most important, innovation and risk-taking now define high-impact leadership. In the words of Mark Zuckerberg, CEO of Facebook, “The biggest risk is not taking any risk. In a world that is changing really quickly, the only strategy that is guaranteed to fail is not taking risks.”⁴ Risk-taking has become one of the most important drivers of a high-performing leadership culture.

DEMOGRAPHICS AND LEADERSHIP DESTINY

Demographic changes are also influencing what is required for a leader to be successful. Millennials expect to be developed throughout their work life

Figure 2. Leadership capabilities needed to succeed in a digital world

Leaders need to think, act, and react differently to make their organizations succeed in a digital world		
Cognitive transformation (THINK differently)	Behavioral transformation (ACT differently)	Emotional transformation (REACT differently)
Conceptualizing possibilities in a virtual world	Adapting to constantly shifting power and influence	Tolerating an environment of risk and ambiguity
Handling ever-increasing cognitive complexity	Collaborating with ease across many different teams	Showing resilience in the face of constant change
Thinking divergently about new ways of doing things	Valuing the contribution of new work partners and different interest groups	Being brave in challenging how things are being done
Making decisions quickly without all of the information	Investing huge amounts of energy into getting things right; try, fail, try again	Having the confidence to take the lead in driving change

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via opportunities, mentoring, and stretch assignments. Likewise, the most sophisticated organizations view leadership development as more than training. They combine organizational design, job design, mentoring, and development programs to create the leaders they need.⁵

However, at many companies today, the leadership pipeline remains too top-heavy, preventing Millennials from getting the on-the-job learning and development they need and leaving organizations struggling to build their leadership pipelines earlier. More than 44 percent of Millennials are now in leadership positions, but most believe they are receiving little to no development in their roles.⁶ In this year’s survey, 54 percent of companies report they have excellent or adequate programs for Millennials, up from only 33 percent two years ago. Despite this shift, Millennials still feel left out; only 28 percent believe their organization is fully taking advantage of their skills.⁷

To address business needs and satisfy the desire for lifelong development and more rapid advancement, many formal leadership programs are being supplemented with developmental assignments, external experiences, stretch projects, and exposure to internal and external leaders.

The percentage of companies with strong experiential programs rose from 47 percent in 2015 to 64 percent in 2017. Our newest research shows that formal training is among the least valued investments to develop leaders.⁸ Instead, companies should focus on establishing a leadership culture, risk-taking, knowledge sharing, and matrix management to build the leaders of the future.

THE DIGITAL LEADER

The most critical need for most organizations is for leaders to develop digital capabilities. Today, only 5 percent of companies feel they have strong digital leaders in place, according to our 2017 *Global Human Capital Trends* survey respondents. In a sign of positive change, however, 72 percent of respondents are developing or starting to develop new leadership programs focused on digital management.



Getting there is hard. Our research on digital leadership, based on studies done with MIT, shows a shift in leadership capabilities in three areas: how leaders must think, how leaders must act, and how leaders must react.

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DIGITAL LEADERS: A FIELD GUIDE

Leadership is critical in making the transformation from an organization “doing” digital things to one that is “becoming” digital. For both the organization and its leaders, this involves three different types of transformations (figure 2):

- **Cognitive transformation:** Leaders need to *think* differently
- **Behavioral transformation:** Leaders need to *act* differently
- **Emotional transformation:** Leaders need to *react* differently

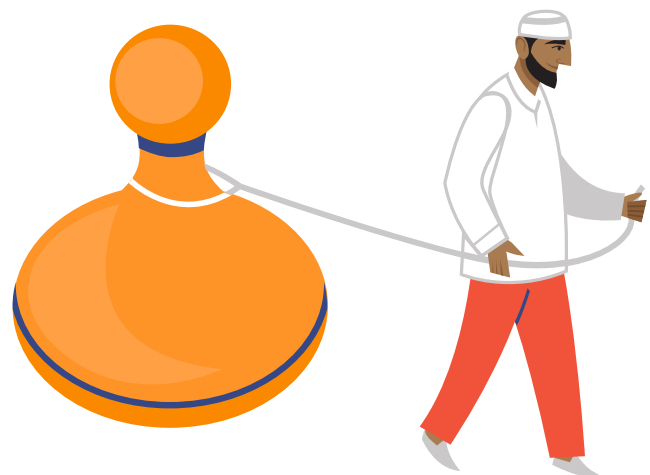
Taken together, these transformations show how radical the digital transformation will be. And organizations should have certain core expectations of digital leaders: They need to make sense of vague external trends, help the organization imagine the digital future, blur the internal and external boundaries in ways that assist the transformation, educate others, repurpose technical expertise, and use design thinking methods to foster innovation.

That is a broad list of leadership characteristics, but it is important to recall that not every digital leader does the same thing. We see three different types

of digital leaders, and most organizations will need some combination of all three:

- **Digital investors:** Senior executives who embrace the VC mind-set, uncover opportunities, invest in talent and ideas, forge partnerships, and build an ecosystem for innovation to thrive
- **Digital pioneers:** Business and function leaders who can reimagine the future, shape new and different business models, and lead a winning digital strategy
- **Digital transformers:** Leaders who can manage people through radical change and transform the business

For digital investors, a principal task is education. This includes educating the board and other senior leaders who may not fully understand the nature



of the shift. Another challenge is getting the investment decisions right, such as choosing between internal investment in systems or purchasing from external vendors at less cost but also with less design control. Digital investors must also determine how to balance the current business model with the digital transformation and then integrate it into the newer, digital models.

Digital pioneers are, in many ways, the heart of innovation. They set the vision for the whole organization, “future-proof” the business, define the roadmap for the next two to three years, and drive both the pace of change and the organization’s new digital capabilities. They ensure a consistent vision and plan for digital throughout the organization.

Digital transformers are at the fulcrum point of leading radical change. Businesses face a particular challenge in finding leaders who can carry on “business as usual” while moving the digital agenda forward.

Lessons from the front lines

As the pace of technology disruption continues to accelerate, the high-tech manufacturing industry is experiencing broad-based talent shortages and skills gaps. One global high-tech manufacturer seeking to explore new operating models to spur rapid growth faced serious leadership challenges as it attempted to shift its business strategy. As its business changed, so did its talent needs, particularly when it came to developing the leaders of the future it needed to implement the new strategy.

The company focused first on growing its own pipeline of leaders. But the organization quickly realized it needed greater precision in identifying leadership potential across its workforce. Specifically, the company zeroed in on two goals: to improve its ability to spot leadership talent across all of its talent pools, especially at the middle manager level; and to identify potential leaders faster and at lower cost.

To achieve these goals, the company developed a framework for leadership potential that outlined the specific attributes most predictive of leadership success. The organization rolled out the tool

to one of its business functions on a worldwide basis. In two weeks, 20 raters assessed more than 100 mid-level leaders across the globe, enabling a rapid, data-based approach. An aggregate report of all leaders was compiled and reviewed with HR leadership. Raters believed the new tool was both easy to use and offered actionable results; these results provided informative and actionable insights to the executive committee, which helped in making future talent decisions.

The organization is now expanding the tool across the entire global organization, allowing it to quickly compare ratings of potential leaders by placing all leaders on a level playing field regardless of function or region. This approach establishes a standard, consistent language for identifying potential across the global organization. It also helps the organization to uncover “hidden gems” in unexpected places, thanks to rich, consistent data from global and regional talent reviews. Indeed, 5 percent of the highest-potential leaders identified in the initial project were “meets expectations” performers—indicating either poor role fit or untapped potential.

Start here

- **Rethink the organization’s leadership model:** The new model should include the concepts of innovation, growth, inclusion, teamwork, and collaboration.
- **Identify the likely digital leaders in the organization:** Determine who can be the investors, pioneers, and transformers. Then train them to understand these opportunities.
- **Ensure accountability:** Identify the person or group responsible to the C-suite and board for building leaders as part of the business strategy.
- **Promote younger people into leadership much faster:** Give them the opportunity to learn on the job and the flexibility to lead teams and projects with support from senior leaders. Use them as reverse mentors to help senior executives learn about technology, work practices, and the culture of younger employees.

- **Foster risk-taking and experimentation through leadership strategy:** Leadership programs must be interdisciplinary and focus on new product and service innovations, encouraging risk-taking and experimentation [as people develop new skills](#).
- **Move beyond traditional leadership training:** Instead, focus on leadership strategy, with an emphasis on culture, empowerment, risk-taking, knowledge sharing, exposure, matrix management, and building talent as guides. Bring in external leaders and rethink your leadership vendors; many are steeped in old models and traditional leadership thinking.

FAST FORWARD

Great leaders have always been expected to succeed in the context of ambiguity. Now, they face even greater pressures as the speed of technology accelerates. The role that leaders play will continue to change, becoming even more digital-focused and team-centric. A focus on organizational practice, including culture and organizational design, will become an ever-more important part of leadership development. Despite this more challenging environment, leaders will be asked to execute at a higher level—and ensure that their organizations do not lag behind in the digital transformation.

Figure 3. Leadership: Old rules vs. new rules

Old rules	New rules
Leaders are identified and assessed based on experience, tenure, and business performance	Leaders are assessed early in their careers for agility, creativity, and ability to lead and connect teams
Leaders must “pay their dues” to work their way up the leadership pipeline	Leaders are identified early and given early, outsized responsibility to test and develop their leadership skills
Leaders are expected to know what to do and bring judgment and experience to new business challenges	Leaders are expected to innovate, collaborate, and use client teams, crowdsourcing, and hackathons to find new solutions
Leadership development focuses on assessments, training, coaching, and 360-degree development programs	Leadership development focuses on culture, context, knowledge-sharing, risk-taking, and exposure to others
Leaders are assessed and developed based on behavior and style	Leaders are assessed and developed based on thinking patterns and problem-solving ability
Leaders are developed through training and professional development programs	Leaders are developed through simulation, problem solving, and real-world projects
Diversity of leadership is considered a goal and important benchmark to measure	Leaders are assessed and trained to understand unconscious bias, inclusion, and diversity in their role
Leadership is considered a difficult role and one that is sacrosanct in the organization	Leadership is considered a role that all play; everyone has opportunities to become a leader
Leaders lead organizations and functions	Leaders lead teams, projects, and networks of teams

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ENDNOTES

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