

RETHINKING DIGITAL TRANSFORMATION

**New Data Examines the
Culture and Process Change
Imperative in 2020**

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We are living in an era of unprecedented change and possibilities, marked by the rise of the internet and fueled by the accelerating pace of digital innovations. In this era, access to information is increasingly democratized, creating the potential for anyone in the world to use technology to produce fundamentally new business value. The relationship between people and technology is dramatically strengthening, and it is accelerating behavioral change in ways we've never seen before. To successfully leverage this opportunity within our own business, we must recognize that the modern organization is becoming a complex socio-technical system.

Modern Organizations Are Complex Socio-Technical Systems

Complex socio-technical systems, unlike their predecessors, can't be fully understood or diagnosed by an expert. Outcomes of these systems are difficult to predict through typical cause-and-effect logic. Therefore, the prescriptive techniques we've used in the past to accelerate change and create business value are becoming increasingly ineffective. It's no wonder so many businesses are struggling to effectively transform, as evidenced by this study.

What Can Business Leaders Do?

In complex socio-technical systems, it is groups of people, not individuals or managers, who can create innovative change. These groups must tune the system through a perpetual cycle of probing, sensing, and responding to outcomes. Nevertheless, leaders play an important role. They must:

- Foster a growth mindset, where curiosity and learning are celebrated
- Assemble groups aligned to principles of collaboration, community, inclusivity, adaptability, and transparency
- Empower groups to apply the scientific method, using observation, hypothesis, and experimentation to learn
- Invite feedback, and use it to direct change via data-driven decision making
- Enforce the need for practice and repetition among teams, in order to create new habits that replace old ones

In doing so, leaders can create the context for cultural change, and continually improve their organization.

Change Over Time

By surveying digital transformation leaders annually, we are able to move beyond point analysis and synthesize trends over time. By doing this, we get better predictions of our own future and what it will take to maximize digital transformation outcomes. I now invite you to further explore the challenges, strategies, results, and learnings from digital transformation leaders across the globe in order to more effectively inform your own strategy.



MIKE WALKER
GLOBAL DIRECTOR
RED HAT OPEN
INNOVATION LABS

RETHINKING DIGITAL TRANSFORMATION

New Data Examines the Culture and Process Change Imperative in 2020

The current state of digital transformation can be summed up in four words: the same but different.

What's remained the same? For years, global executives have understood what it takes to succeed in this area. Eighty-six percent of nearly 700 respondents in a recent survey by Harvard Business Review Analytic Services say transformation requires a combination of the right culture, revised business processes, and new technology. However, only 20% of them—not many more than in the recent past—rate their transformation strategies as being effective.

What's different? The drive for digital transformation has only intensified and become more essential for business success. Ninety-five percent of the executives surveyed say it has grown in importance over the past two years, with 70% describing the change as significant.

“The push for digital transformation is accelerating in a world where companies increasingly compete on innovation, speed, and adaptability,” notes Deborah Ancona, professor of management at the Massachusetts Institute of Technology (MIT) and founder of its Leadership Center.

Another change is that the modest rise in the effectiveness of change management strategies is forcing organizations to rethink their approaches to transformation. “Many business leaders are recalibrating their strategies as they’re becoming more realistic about the difficulty of achieving digital transformation,” says Melissa Swift, leader of the digital advisory unit of Korn Ferry, a consulting firm based in Los Angeles. “They’re realizing that the answer isn’t better technology, it’s better everything else around it. Unfortunately, a large number of companies still lack a cohesive strategy from a people perspective about how to move the organization forward.”

The Harvard Business Review Analytics Services survey identified a select group of digital-transformation leaders who have taken this people and process imperative to heart. They’ve implemented policy and organizational changes designed to create a culture of transformation. As a result, these organizations are doing more than overcoming stubborn problems that have been diluting transformation efforts. They’re also reaping business rewards for their efforts. For example, twice as many transformation leaders than the rest of the sample say revenues have grown significantly as a result of digital transformation, and they surpassed their peers by double-digit rates in other key areas, including operational efficiency, competitiveness, and customer retention rates.

HIGHLIGHTS

84%

OF THE EXECUTIVES SURVEYED AGREE THAT NEW BUSINESS OPPORTUNITIES ARE EMERGING AS THEIR ORGANIZATION DIGITALLY TRANSFORMS.

70%

SAY OVER THE PAST TWO YEARS DIGITAL TRANSFORMATION HAS BECOME SIGNIFICANTLY MORE IMPORTANT TO BUSINESS SUCCESS.

63%

RANK CULTURAL CHALLENGES AS THE BIGGEST IMPEDIMENTS TO TRANSFORMATION EFFORTS.

20%

RATE THEIR COMPANIES’ DIGITAL TRANSFORMATION EFFORTS AS EFFECTIVE.

Transformation leaders also provide a guide for others about how to improve their transformation efforts in the months ahead. Their success starts with a detailed understanding not only of the main roadblocks that impede success, such as cultural, process, and technology issues, but also of the underlying complexities within these areas that make change so difficult. From this baseline, leaders define a multifaceted strategy that

helps everyone in the organization understand why transformation is important, brings together cross-functional teams to address the biggest barriers, and formulates metrics to monitor progress and keep efforts on track.

Success Remains Elusive for Many Companies

Transformation requires a multifaceted effort encompassing cultural change, business process modernization, and targeted technology investments. But one of those pillars requires special attention. Sixty-three percent of the executives surveyed name cultural issues as the biggest barrier to transformation success. Comparing that number to results from the baseline survey conducted by Harvard Business Review Analytic Services in 2018 shows that organizations are still having trouble addressing cultural problems.

Two years ago, 55% of the respondents ranked culture as the top roadblock. If overcoming cultural issues is critical, and most executives recognize this reality, why aren't they seeing more success? One explanation is that as organizations delve deeper into cultural change, they are finding the challenge is more complex than they first realized. "Transforming the culture for digital transformation is easier said than done," says Behnam Tabrizi, academic director of Stanford University's executive program and author of the books *Rapid Transformation* and *The Inside-Out Effect: A Practical Guide to Transformational Leadership*. "It takes a new operating system outside of the regular norms of the organization to change cultures."

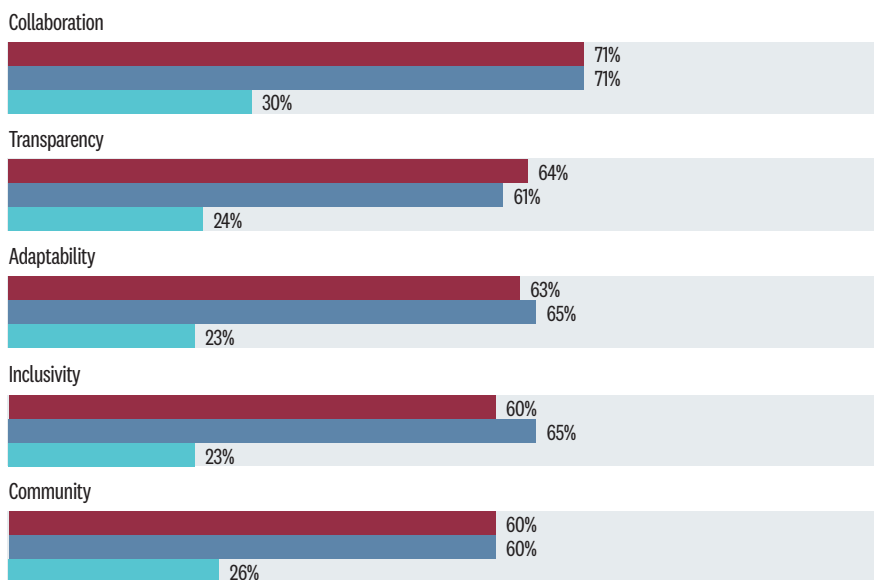
FIGURE 1

CULTURE IS KEY TO TRANSFORMATION SUCCESS

Transformation leaders distinguish themselves in multiple cultural categories

How important are each of the following cultural characteristics in enabling digital transformation in your organization?

- EXTREMELY IMPORTANT
- TRANSFORMATION LEADERS THAT POSSESS THE CHARACTERISTIC
- THE REST OF THE ORGANIZATIONS THAT POSSESS THE CHARACTERISTIC



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, NOVEMBER 2019

“Digital transformation is not just the IT department’s job; it requires having a team come together to **redefine how to access and use data** for business results,” says Dave Ulrich, Rensis Likert professor at the University of Michigan’s Ross School of Business.

Follow-on questions shed light on the complexities that impede cultural change. When executives ranked the importance of five components of transformational cultures in the latest survey, 71% identified collaboration as the most important characteristic. However, only 38% say their organization possesses this quality. That's only a slight improvement over 32% in 2018.

Other cultural characteristics also showed only moderate improvement since 2018, with one exception—adaptability. The number of organizations overall that possess this quality rose by 10 percentage points.

While the year-over-year results were similar, significant differences emerged between transformation leaders and the rest of the respondents. For example, 71% of transformation leaders say their organizations are collaborative versus only 30% of the rest of the sample. [FIGURE 1](#)

Transformation leaders also distinguish themselves in other cultural elements. Sixty-five percent of that select group say their organizations are geared for adaptability, for example, by enabling information to flow freely and empowering certain individuals to make decisions that respond to changing business conditions. However, only 23% of the remaining survey respondents say their organizations support adaptability. The low percentages may relate to two challenging stumbling blocks. First, many organizations struggle to break down departmental barriers that discourage information sharing. Second, senior executives must be willing to adjust hierarchical decision-making structures to allow more junior managers and frontline staff to act on their expertise when appropriate.

In addition, 61% of the high performers benefit from cultures designed for transparency compared to just a quarter (24%) of the rest.

“Digital transformation is not just the IT department’s job; it requires having a team come together to redefine how to access and use data for business results,” says Dave Ulrich, Rensis

Likert professor at the University of Michigan’s Ross School of Business and coauthor of the book *Reinventing the Organization: How Companies Can Deliver Radically Greater Value in Fast-Changing Markets*. “Form a digital team consisting of experts from finance, marketing, IT, HR, operations, and other departments so that the overall digital agenda goes forward.”

Business Processes Need Upgrades

The second transformation pillar—process modernization—also shows gaps between its perceived importance and a company’s ability to implement it successfully. [FIGURE 2](#) A solid majority (68%) of executives in the latest survey highly value continuous integration/continuous delivery (CI/CD), a process for expediting the rollout and ongoing enhancement of new applications to address changing

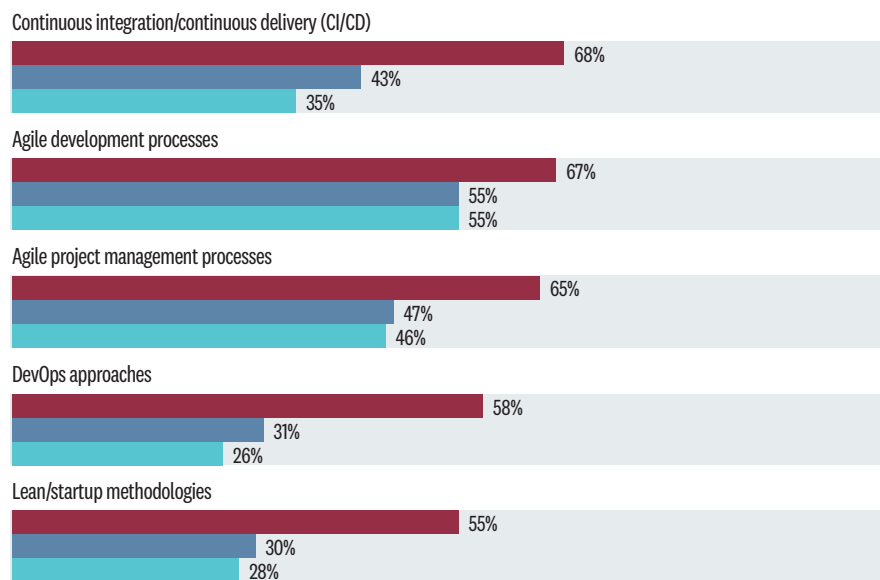
FIGURE 2

FORMAL METHODOLOGIES SUPPORT PROCESS MODERNIZATION

Organizations continue to struggle with implementations

How important are the following process changes to enabling digital transformation?

- EXTREMELY IMPORTANT
- ORGANIZATIONS THAT IMPLEMENTED THE METHODOLOGY, 2019
- ORGANIZATIONS THAT IMPLEMENTED THE METHODOLOGY, 2018



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, NOVEMBER 2019

“WE SEE SOME FUNDAMENTAL DISCONNECTS BETWEEN BUSINESS GOALS AND TECHNOLOGY INVESTMENTS WHEN COMPANIES START CHASING SHINY OBJECTS.” MELISSA SWIFT, LEADER OF THE DIGITAL ADVISORY UNIT OF KORN FERRY



business requirements. Yet, just 43% of respondents say their organizations have implemented this methodology, which is only a moderate gain from the 35% who were using CI/CD in 2018. A complementary process methodology focuses on improving project management by applying agile techniques, which include assembling cross-functional teams that promote transformation through a series of iterative steps. While agile project management is also highly rated among a majority of the executives responding to the survey, fewer than half of the organizations have successfully adopted this approach.

This gap between understanding the importance of process changes and successful implementation shows how much fundamental change is required to adopt concepts like cross-departmental collaboration and “fail-fast” iterations. The underlying attitudinal changes and resource commitments remain difficult for many traditional organizations to make.

The effectiveness of technology also continues to lag behind shifting business requirements. Digital transformation’s overarching goal is to use innovative technology to create new business models, products, or services. Accordingly, nearly three-quarters (72%) of the survey respondents prize the technical ability to respond rapidly to customer demands. **FIGURE 3** Yet, only 31% of executives say their organizations effectively meet this goal, which represents only limited progress since 2018 when a quarter (24%) of the organizations said they were effective in this area.

The lack of well-defined business goals helps explain why organizations aren’t getting the anticipated value of their technology investments. “Executives must make sure any new technologies they implement are truly business centered,” Korn Ferry’s Swift says. “We see some fundamental disconnects between business goals and technology investments when companies start chasing shiny objects. If improving customer experience is what’s really important to the business, for example, IT must be aligned with that desire.”

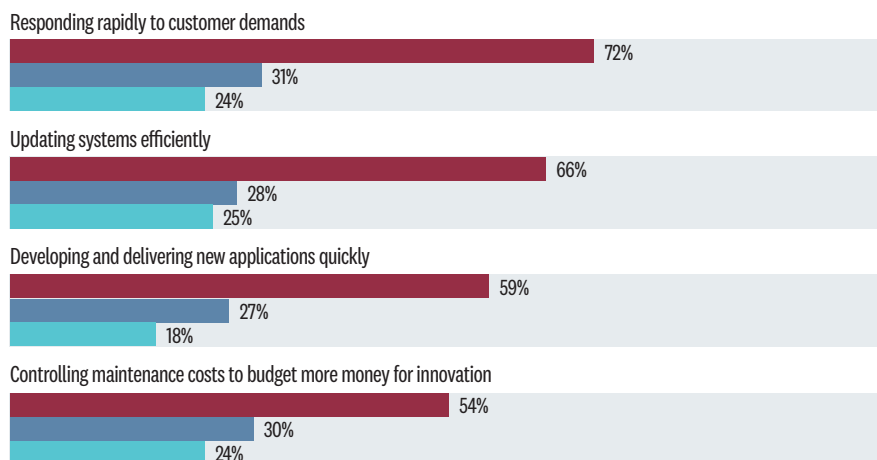
FIGURE 3

BUSINESS GOALS DICTATE TECHNOLOGY REQUIREMENTS

Executives report slight gains in digital effectiveness

How important are the following technology capabilities to your organization’s digital transformation efforts?

- EXTREMELY IMPORTANT
- ORGANIZATIONS THAT IMPLEMENTED THE METHODOLOGY, 2019
- ORGANIZATIONS THAT IMPLEMENTED THE METHODOLOGY, 2018



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, NOVEMBER 2019

Tackling Challenges to Transformation Success

The survey respondents report that their organizations are strengthening their commitments to addressing the three core roadblocks to transformation success—shortfalls in cultural change, business process modernization, and technology capabilities. But companies are first tackling the areas seen as less challenging than cultural change. Seventy-seven percent of respondents say their commitment to addressing technology advancements is much higher than two years ago, while 74% say they are committed to process modernization. Seventy percent say their commitment to the most difficult challenge, cultural change, is much higher than in 2018, but relatively less than for the other two factors. This may be a sign that executives know culture is important, but they’re unclear about how to fully address it.

However, transformation leaders are breaking from their less successful peers in how they’re prioritizing their

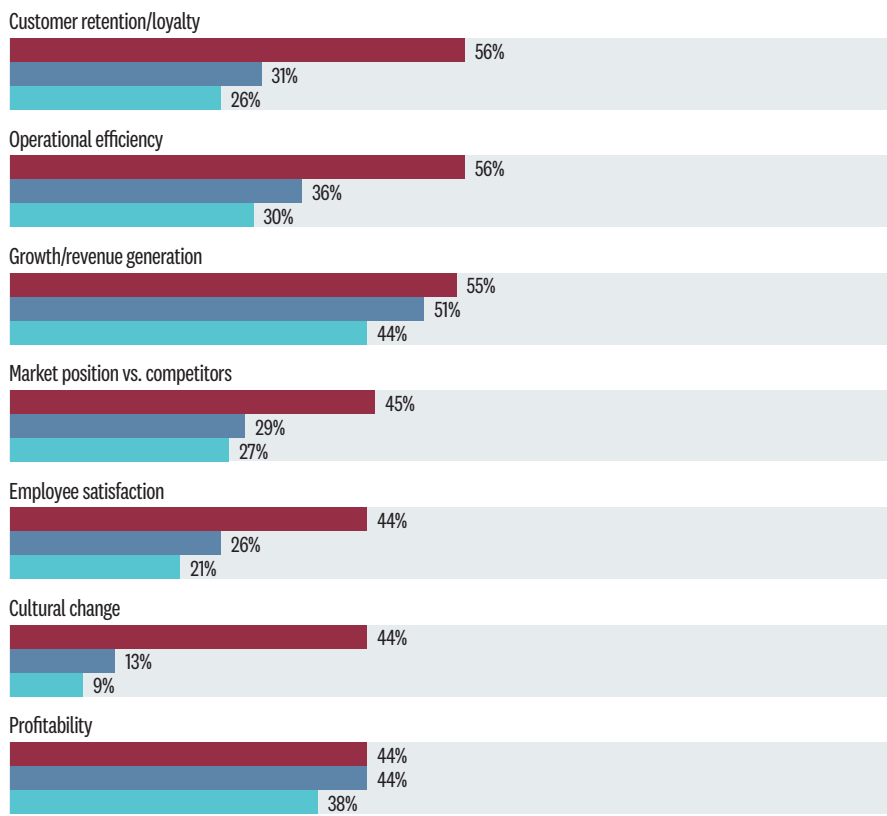
As the low percentages and lack of significant year-over-year progress shows, **cultural change** remains much harder to assess. Organizations will need to **prioritize the development of metrics in this area** to keep digital transformation efforts on track.

FIGURE 4
ORGANIZATIONS HAVEN'T FULLY REVISED KPIS FOR TRANSFORMATION

Monitoring progress remains a struggle

Which of the following key performance indicators (KPIs) would be the best measures of the success of your digital transformation efforts?

- RESPONDENTS WHO CHOOSE THIS KPI AS THE BEST MEASURE
- RESPONDENTS THAT HAVE IMPLEMENTED THE KPI, 2019
- RESPONDENTS THAT HAVE IMPLEMENTED THE KPI, 2018



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, NOVEMBER 2019

response to transformation challenges. For leaders, commitment to cultural change ranks highest, followed by process modernization. Flipping the order of priorities seen across the entire survey shows leaders have a much higher appreciation for which factors require the most attention for effective transformation strategies.

Finally, a stumbling block that's related to the three core challenges has also lingered since 2018—the difficulty of accurately monitoring transformation progress, which is necessary for identifying strategy and technology gaps that must be addressed in the months ahead. Respondents agree which key performance indicators (KPIs) are best for monitoring transformation efforts. The executives continue to rank the same KPIs in the top five (three are tied for fifth place). **FIGURE 4** But there is only marginal improvement in how many companies are actually using these gauges to measure success.

Revenue growth and profitability are the go-to measurements. Other key business metrics, ranging from customer retention and operational efficiency to employee satisfaction, are also important not only for gauging the impact of digital transformation efforts, but also for assessing the overall competitive strength of a company. However, as the low percentages and lack of significant year-over-year progress show, cultural change remains much harder to assess. Organizations will need to prioritize the development of metrics in this area to keep digital transformation efforts on track. (For guidance, see Step 3, page 9.)

As noted earlier, digital transformation leaders are not only measuring their

77%

**OF RESPONDENTS SAY THEIR COMMITMENT
TO ADDRESSING TECHNOLOGY
ADVANCEMENTS IS MUCH HIGHER THAN
TWO YEARS AGO.**

TRANSFORMATION LEADERS HAVE CLEAR STRATEGIES FOR DRIVING ORGANIZATIONAL AND TECHNOLOGICAL CHANGE TO SUPPORT INNOVATION.

transformation results; they are also seeing clear business benefits for their efforts. **FIGURE 5**

Five Steps for Boosting Transformation Success

What do leaders know about transformation success that continues to elude their less mature peers? Transformation leaders have clear strategies for driving organizational and technological change to support innovation and the ongoing enhancements of business models, products, and services. Survey responses from leaders, along with insights from consultants and academics who specialize in organizational change, offer five guidelines for promoting the success of transformation projects.

STEP 1: DEFINE AND COMMUNICATE UNDERLYING BUSINESS GOALS.

People throughout the organization—from the C-suite to frontline employees—must understand why transformation is important and how the company will evolve as a result.

“Paint a vision that shows you will be a better company as transformation continues,” advises George Westerman, senior lecturer at the MIT Sloan School of Management and author of the book *Leading Digital: Turning Technology into Business Transformation*. “The vision should be clear and compelling for people, but it doesn’t need to have all the details spelled out. Be clear enough to set the direction but open enough that people can fill in the details.”

For example, a large bank in Singapore that he worked with struggled to overcome chronically low customer-experience ratings. To change this shortcoming, senior leaders asked staff members to envision ways to make banking more joyful for customers. “The executives didn’t define what ‘joyful banking’ is,” Westerman explains. “But they did say that waiting in long lines before making a transaction is clearly unjoyful for customers. The bank’s executives then said, ‘If you ever see anybody waiting, let’s figure out how to fix that.’”

Suggestions for improvements streamed in from many frontline workers. Changes included using additional digital tools to make it easier for customers to conduct routine tasks without coming to a physical branch. They streamlined reports and exception processes so that customers who still had questions could get answers quickly. This and other measures reduced wait times by millions of hours per year. “The company went from being the worst for customer experience to the best,” Westerman says.

Articulating a business case for this effort will help paint a shared vision of the future. “Make sure leaders recognize what digital offers the business in terms of value created for all stakeholders,” the University of Michigan’s Ulrich says.

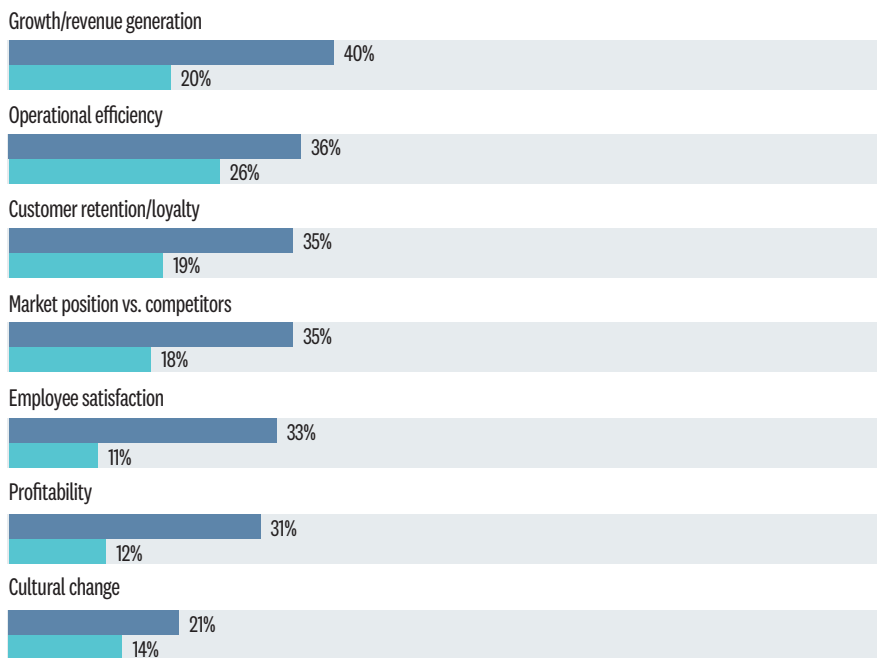
FIGURE 5

TRANSFORMATION LEADERS ENJOY CLEAR BUSINESS BENEFITS

Revenue growth and efficiency gains boost bottom lines

Which of the following measures of corporate performance have improved significantly as a result of your organization’s digital transformation?

- TRANSFORMATION LEADERS THAT REPORT SIGNIFICANT IMPROVEMENT
- NON-LEADERS THAT REPORT SIGNIFICANT IMPROVEMENT



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, NOVEMBER 2019

Ulrich adds that it's also important that people throughout a company have realistic expectations about the impact of innovation. "Some people think digital transformation will change more than it does," he explains. "Digital transformation uses technology to provide data to make better decisions—it is good to keep that in perspective."

STEP 2: REDOUBLE EFFORTS TO ACHIEVE CULTURAL CHANGE.

Transformation veterans say committing to a distributed leadership model—where effective leadership exists at all levels, not just at the top—will enhance important cultural characteristics, such as collaboration, transparency, and adaptability. "This requires senior executives to change from feeling like they must always be directing people about what to do, to enabling people throughout the organization to take part in decision making," MIT's Ancona says. "That's often scary for senior leaders unless they recognize that they can be great leaders by architecting a system where many people can lead."

Cultural change through distributed leadership also represents a new way for mid-level executives to work. "Their role shifts to helping entrepreneurial-minded members of their staff have their ideas heard," Ancona says.

Developing cross-functional teams will further the cultural evolution of modern organizations. Because transformation impacts a wide range of business initiatives, large organizations may need a variety of different teams. "One may be dedicated to revising performance incentives, while another works on the company's go-to-market strategy. Each team may have seven to 10 members," Stanford University's Tabrizi explains. "Ideally, these cross-boundary teams would report directly to a governance team, thus flattening organizational hierarchies and driving transparency, accountability, and quick decision making."

He adds that as team members interact with senior people, they gain an understanding of business challenges outside of their departments, which helps team members become more

productive in their regular jobs because they see the larger vision of what the company is trying to accomplish.

"It's a potent combination because now you have all these change agents across the organization," Tabrizi says. "I often see people who work on these teams get promoted because senior people see them in action. They're not hidden within multiple layers of the corporate hierarchy. This approach can be a win for everyone."

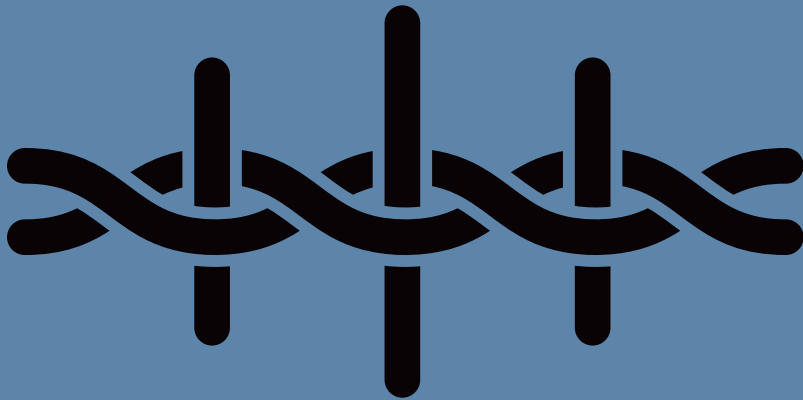
One hospital Tabrizi worked with sought to increase its patient load without reducing the quality of care or hiring additional employees. For answers to this balancing act, the organization created cross-functional teams that included doctors, nurses, and facilities people. The team created a central management center that tracked every patient and calculated any delays they experienced in receiving treatments. This data provided a baseline measurement of patient cycle times from hospital admittance to discharge. The information identified efficiency gaps and opportunities to streamline patient care. As patient volume increased 15% over three years, avoidable delays in the hospital decreased 15%, along with a 50% reduction in the number of ambulances being turned away.

STEP 3: DEVELOP KPIs TO TRACK CULTURAL CHANGE.

Performance measures designed to cultivate collaboration and adaptability among workers will help organizations update policies for how employees will be evaluated and compensated. "Steer away from performance metrics that flatly telegraph, 'This is a public company that has to meet quarterly financial milestones that we can't fail to hit,'" Swift says. "You need to also measure people according to how collaborative and adaptable they are."

Cultural change starts with a baseline understanding of the current organization. Tools such as the Organizational Culture Assessment Instrument, developed by University of Michigan professors Robert Quinn and Kim Cameron, can identify gaps between existing cultural

"PAINT A VISION THAT SHOWS YOU WILL BE A BETTER COMPANY AS TRANSFORMATION CONTINUES." GEORGE WESTERMAN, MIT SLOAN



“TRANSFORMATION ISN’T JUST A PROJECT. IT’S SOMETHING THAT MUST BECOME A PART OF AN ORGANIZATION’S BEING. THAT MEANS PUTTING A CULTURE IN PLACE SO THAT TRANSFORMATION BECOMES A NATURAL WAY OF WORKING.” GEORGE WESTERMAN, MIT SLOAN

characteristics and future goals. To measure progress toward those goals, organizations should first focus on near-term assessments. That may include gauging the participation of individuals and work groups in brainstorming innovation ideas and piloting those proposals. Executives can then turn to tracking longer-term results. For example, they may measure the percentage of the workforce that is actively involved in cross-functional teams devoted to digital projects. Organizations may also tally the number of innovation ideas that have been adopted by the organization and the percentage of internal staff that have been promoted to key digital roles.

“Also, determine how to recognize people who are good collaborators who sometimes go unrecognized, such as introverts,” Swift adds. “Stop only rewarding the old-fashioned, often stereotypically masculine model of success: the people who are successful at getting their ideas across because they are the most vocal in meetings. As long as we keep rewarding that model, we’re not going to get the level of collaboration and silo breaking needed for the kind of integrated work that properly drives digital transformation.”

STEP 4: ADDRESS BUSINESS PROCESS CHALLENGES.

The best efforts aimed at helping workforces become more collaborative and adaptable will falter if outdated corporate structures continue to reinforce old behaviors. To avoid this risk, executives should shift to organizational structures designed for nimbleness and agility.

Transformation leaders from the Harvard Business Review Analytic Services survey showed they understand that businesses become better at innovating and addressing customer needs when they adopt agile techniques. More than half (58%) of the transformation leaders have expanded agile methods from the IT department and are now using relevant principles for project management. “Organizations that have successfully integrated agile techniques—along with all of the other

transformation that entails—are hitting it out of the park,” Swift says. “The ones that are struggling expect those process changes to solve all of their transformation problems. They think, ‘We implemented agile [methodology], why didn’t everything change for the better?’ The answer is that they haven’t also addressed the elements of transformation beyond process modernization.”

A majority (56%) of leaders are also pairing their use of agile techniques with CI/CD practices, which helps foster ongoing change in iterative steps.

Methodologies aren’t the only answer for improving business processes. In some cases, organizations must solve lingering interdepartmental friction that gets in the way of change. For example, some IT staff and business departments aren’t closely aligned. “I hear it over and over again from business executives, ‘Digital is fast, but our IT department is slow, so we’re going to do transformation without the IT people,’” Westerman says. “That’s a bad idea. Beyond simple stand-alone apps, it’s very hard to do real transformation without the knowledge that IT people have.”

A slow pace may be necessary for IT to accurately assess the security and compliance implications of proposed new technology and services, and to ensure that similar capabilities aren’t already available via existing applications. “Many companies have lived with decades of slow and overly bureaucratic IT, security, and compliance processes,” Westerman says. “But this can change, if senior business execs insist on it, and are willing to change the way they work, too.”

STEP 5: IDENTIFY HIGH-IMPACT TECHNOLOGY INVESTMENTS.

Transformation leaders have clear ideas about which technology investments will best support business transformation. Over the past two years, most leaders (63%) have invested in collaboration platforms to promote multi-channel communications throughout their organizations. In addition, 61% of the transformation

leaders have earmarked funds for business process automation. Other significant investment areas for leaders have included cloud analytics platforms (57%), digital automation systems (51%), and artificial intelligence technology (50%). In each category, transformation leaders outspent their peers, in some cases by significant amounts.

Across all the companies surveyed, spending plans for the next 18 months will shift some priorities. Notably, collaboration platforms are expected to drop to fourth place on technology roadmaps, while AI takes over the top spot.

A New Way of Working

Some, but not all, aspects of digital transformation have remained essentially the same since 2018, including stubborn complexities that continue to surround cultural, business process, and technology modernization.

However, a small group of transformation leaders are forging a different path. The five steps above offer a view of how they are setting themselves apart from industry peers and gaining business value from digital innovation. These leaders are also able to tie these efforts to key business goals, such as revenue growth, operational efficiency, and customer retention. Fortunately, misguided notions about technology being at the heart of digital transformation appear to be dismissed by leaders and followers alike. In their place is a clear appreciation for fundamental organizational change, brought about by reimagined corporate cultures, business-process modernization, and technology upgrades.

“Transformation isn’t just a project,” Westerman says. “It’s something that must become part of an organization’s being. That means putting a culture in place so that transformation becomes a natural way of working.”

METHODOLOGY AND PARTICIPANT PROFILE

A total of 690 respondents drawn from the HBR audience of readers (magazine/ newsletter readers, customers, HBR.org users) completed the survey.

SIZE OF ORGANIZATION

19% 100-499 EMPLOYEES	9% 500-999 EMPLOYEES	24% 1,000-4,999 EMPLOYEES	10% 5,000-9,999 EMPLOYEES	39% 10,000+ EMPLOYEES
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SENIORITY

19% EXECUTIVE MANAGEMENT/ BOARD MEMBERS	44% SENIOR MANAGEMENT	19% MIDDLE MANAGEMENT	17% OTHER
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KEY INDUSTRY SECTORS

ALL OTHER INDUSTRIES WERE 6% OR LESS.

13% FINANCIAL SERVICES	11% MANUFACTURING	10% TECHNOLOGY	8% BUSINESS/ PROFESSIONAL SERVICES	7% CONSULTING	7% GOVERNMENT/ NOT FOR PROFIT
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JOB FUNCTION

ALL OTHER JOB FUNCTIONS WERE 7% OR LESS.

20% GENERAL/ EXECUTIVE MANAGEMENT	16% CONSULTING	13% FINANCIAL SERVICES	11% SALES/BUSINESS DEVELOPMENT/ CUSTOMER SERVICE	11% MANUFACTURING	10% TECHNOLOGY	8% BUSINESS/ PROFESSIONAL SERVICES	8% IT/SOFTWARE ENGINEERING
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REGIONS

37% NORTH AMERICA	25% EUROPE	21% ASIA/PACIFIC	7% LATIN AMERICA	7% MIDDLE EAST/ AFRICA	2% OTHER
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Figures may not add up to 100% due to rounding.



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