

Preparing for tomorrow's workforce, today

Insights from a global survey of business and HR leaders



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Contents



4

Preparing for tomorrow's workforce, today

5

Key findings



6

The most important organisational capabilities

9

What's putting your organisation's success at risk?



11

Key priorities for action

- 12 Create a competitive advantage through a more engaging people experience
- 18 Use workforce analytics to make the most of your talent
- 20 Bring HR and business leaders together to create real change
- 21 With so much to gain from technology, HR needs to step up
- 22 Harness the potential of flexible talent and innovation
- 24 Get your story straight



26

Building trust and taking action: the first steps

29

Conclusion

30 About the survey

Leaders preparing for tomorrow's workforce know they face the twin challenges of producing growth and preparing for the new, often unknown opportunities the future will bring. The most astute leaders also know they must answer a deeper question: How can I deliver great performance by helping our people to thrive? This requires a clear vision for an uncertain world – one that sets out transparently the plans that allow people to take on new and augmented roles, and vitally, to create a compelling people experience. Most businesses still have work to do.

Preparing for tomorrow's workforce, today

How we work, the importance of work in our lives and even what we mean by work are all being transformed.

Technology is seen as the most radical driver of change, from artificial intelligence (AI) and automation to digital mobility and virtual collaboration – yet other trends could be just as decisive. The lines between our work and personal lives are shifting. Diversity and demands for equality are also reshaping the workplace. We are living longer, which means we will be asked to master more and different skills over time as the nature of work changes. And social and environmental pressures are creating demands for more flexible working conditions, as is the gig economy.

These changes are a source of anxiety and insecurity: we do not know how many or which jobs will be automated out of existence. What we do know is that there are opportunities to make working lives more productive, meaningful and fulfilling. Organisations will need to rebalance their workforces to focus more on a collaboration between technology and humans, and to harness human skills, such as creativity, empathy and ethics alongside digital skills. Companies that understand and act on these workforce changes now will not only have the skills but also the organisational motivation, innovation and adaptability to thrive.

So, how do organisations prepare for tomorrow, today? In our recent study *Workforce of the future: The competing forces shaping 2030*, we considered the implications of the possible 'worlds' that could develop and the 'no regrets moves' that organisations should take with a range of potential futures in mind.¹ Our aim with this new study is to identify, in practical terms, what companies need to invest in today, no matter what the future holds.

We collaborated with Lynda Gratton, Professor of Management Practice at London Business School, to identify the most important organisational capabilities that businesses need to consider when preparing for tomorrow's work, workers and workplaces, so they will be ready to take on the disruptive challenges ahead.

A global survey of more than 1,200 business and HR leaders from 79 countries gauged how important they believe these capabilities are for their future and whether they're taking action today to build or even introduce them into their organisations. It's clear that companies understand which capabilities are important for their future success. Nurturing 'human skills' ranked as the second most important capability after building trust. Organisations also understand the importance of using data analytics and of creating a working environment that keeps and attracts talent. But we also found that, by their own admission, they're not doing enough to develop these capabilities. This gap, we believe, will put them at risk in the future when it comes to attracting, developing and retaining talent.

The action imperatives we identify to bridge this 'at risk' gap go beyond simply upskilling for technological change. They also address the challenges of creating 'good work,' a sense of purpose and the creation and delivery of a great people experience. Some organisations are already ahead of the curve. In this report, we examine the key actions that all forward-looking business leaders should be taking today to keep them competitive tomorrow.

Our thanks to all those who kindly shared their perspectives and helped shape this study.



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¹ "Workforce of the Future" PwC 2018, <https://www.pwc.com/futureworkforce>

Key findings

Based on a survey of 1,246 business and HR leaders in 79 countries



People experience dividend is at risk

Although organisations know how important it is to create the right everyday experience at work – eight out of the top ten capabilities, ranked by importance, show this – they also say they're failing to deliver. Thirteen of the top 20 'at risk' capabilities relate to the people experience.

Untapped potential in data and analytics

Companies are struggling to use data and advanced analytics to make better decisions about the workforce. The top three 'at risk' capabilities all relate to workforce analytics and their use in improving the working environment and people's behaviours.

Time to get HR and business leaders on the same page

HR leaders are more comfortable with their efforts to prepare the workforce of the future compared with non-HR leaders. In 42 of the 45 capabilities we asked about, a higher percentage of business leaders than HR leaders saw their organisation at risk.

'Tech-savvy HR' needs to step forward

HR's ability to navigate the technology landscape is a top 'at risk' capability for organisations. But HR and other leaders don't see it the same way: 41% of HR leaders are confident that their HR departments are up to speed in this area, but only a quarter of business leaders agree.

Missing out on good ideas and flexible talent

More than half (58%) of respondents say they have no capability to use open innovation and crowdsourced ideas from outside the business and less than 10% agree strongly that they can do this. Similar numbers of respondents say they have the desire but inability to make use of flexible talent – people who work off-site at times that suit them.

Doing right by their people

There's good news: The capabilities that respondents rate as the most important – building trust, human skills and well-being – are the ones where they are taking most action. But there's more for organisations to do: 55% have not taken action to create a clear narrative about the future of their workforce and automation.

The most important organisational capabilities for the future

Trust, humanness – the things that make humans different from machines – and individual adaptability dominate the list of capabilities that respondents to our survey see as most important when preparing their organisations for tomorrow's business environment.



In our survey, we asked more than 1,200 business and HR leaders in 79 countries to gauge the importance of 45 organisational capabilities. Priorities such as creating trust and transparency, nurturing human skills, valuing human-centric working and well-being dominate the list of capabilities that our respondents believe are key (see Exhibit 1). The results also highlight the importance of promoting adaptability and employability within the workforce.

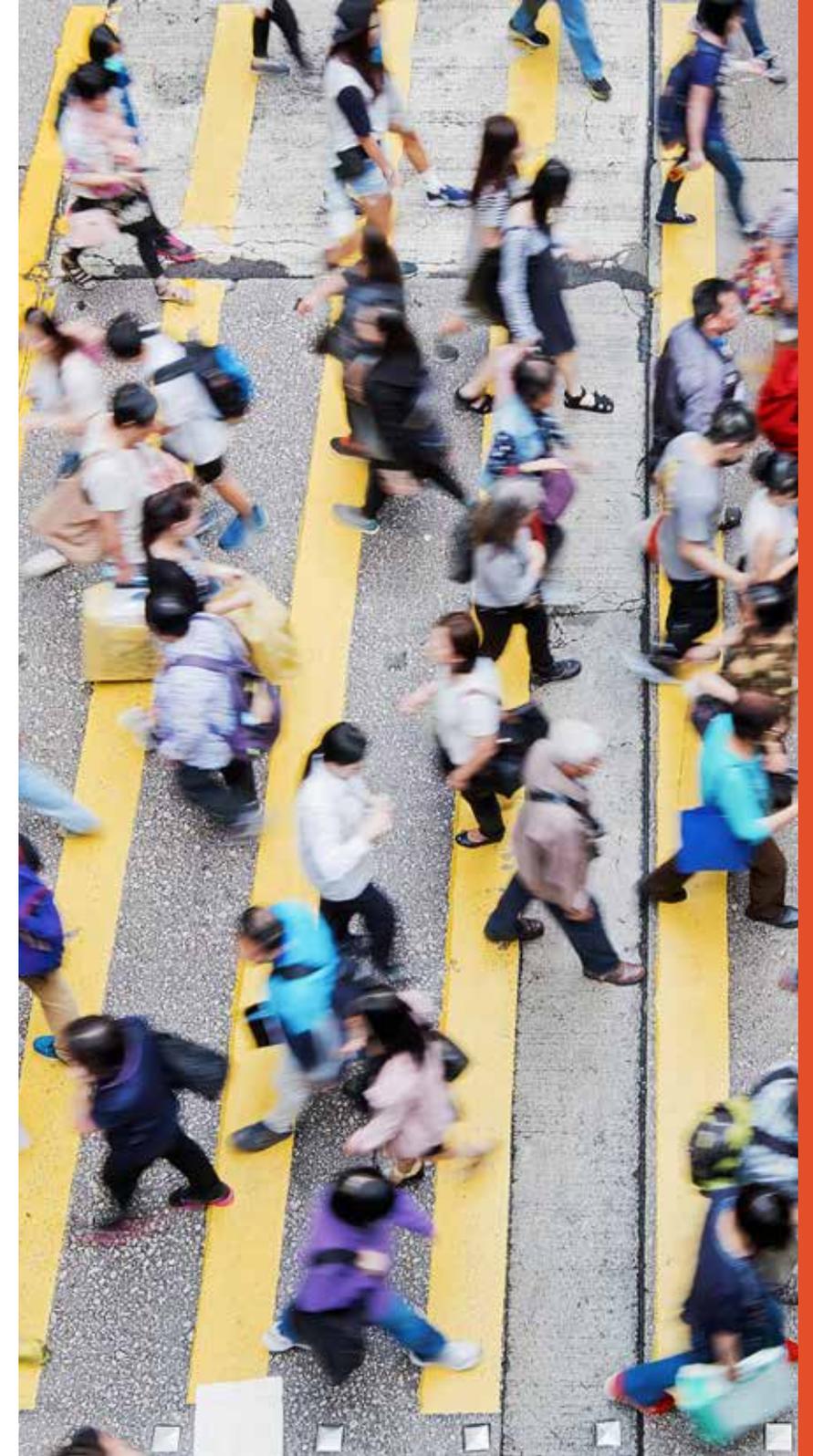
Yet there are also areas that did not make the top ten that we would argue are critical. These include the challenges posed by automation in areas such as aligning with corporate purpose (which ranked 18th) and mapping activities that could be automated (which ranked 25th). Some industries, however, did see these capabilities as a higher priority than others, notably financial services, which ranked automation and corporate purpose ninth and job mapping 15th in importance.

The report identifies what actions organisations prioritise now and what actions they know are important for their future success but which they are failing to implement. We call these 'at risk' capabilities (see Exhibit 2). Organisations know the world of work is changing, but they are not yet providing the workday experiences that people are demanding. We found that business leaders are far less confident than HR leaders that their HR functions are up to the task, primarily in data analytics and forward planning.

“

Despite the changing context of work, people's desire for 'good work' – defined as work with purpose in an environment that is nurturing – has remained remarkably consistent over the years. It is imperative for corporate leaders to embrace this concept and focus on crafting a great people experience in the context of, but not distracted by, wider trends such as technological development.”

Lynda Gratton, Professor of Management Practice at London Business School



The top ten organisational capabilities for the future

Exhibit 1: The top ten capabilities ranked by importance

Question: How important are the following to the future of your organisation? (Percentage of respondents choosing the two most critical options: 'Extremely High Importance' and 'High Importance')

- 01 Trusted by society**
We are an organisation that's trusted by society, our customers and our employees **(91%)**
- 02 Human skills**
We highly value, develop and reward 'human' skills such as leadership, creativity, empathy and curiosity **(87%)**
- 03 Well-being**
We have initiatives and policies in place that are successful in ensuring positive physical and mental well-being among our workers **(82%)**
- 04 Output not hours**
The performance management practices of our company focus on work and task output and value added rather than hours worked **(80%)**
- 05 Collaborative environment**
Our working environments are designed to encourage teamwork, collaboration and innovation **(79%)**
- 06 Adaptability**
Our talent practices and processes (e.g., rotations, secondments, learning and development opportunities) are designed to nurture employee agility and adaptability **(78%)**
- 07 Work-life balance**
We attract talented people by providing a good work-life balance and flexibility over hours and working locations **(77%)**
- 08 Innovation**
We have avenues present for employees to offer innovative ideas and support them in turning these ideas into action **(76%)**
- 09 Pay transparency**
We ensure fair pay by creating transparency in how remuneration is determined **(76%)**
- 10 Re-skilling**
We nurture re-skilling and continuous learning to help workers remain employable **(76%)**

Organisational capabilities, compound noun, plural
ôr-gə-nə-'zā-shnəl kâ-pə-'bi-lə-tēs
The ability and the capacity to perform specific tasks that benefit organisations

What's putting your organisation's success at risk?

Organisations are failing to act today on some of the key capabilities they say are important to their futures.



By looking at the number of respondents who say a capability is important to the future of their business – but who also indicate they are not yet taking action – we can identify where organisations are most ‘at risk’ of jeopardising their future success (see Exhibit 2).

These ‘at risk’ or vulnerable capabilities focus on the people experience. They include emerging norms of flexible working hours and flexible career paths. They also include the development of skills needed to future-proof the HR function, such as using advanced workforce analytics to predict and plan for what jobs and talent will be required in a world of AI and automation.



The top ten ‘at risk’ organisational capabilities relate to the people experience and use of analytics

Exhibit 2: The top ten capabilities ranked by risk, high to low

Question: How important are the following to the future of your organisation? (‘Extremely High Importance’ or ‘High Importance’) and **Question:** To what extent do you agree or disagree with these statements right now? (those who do not agree). We calculated ‘at risk’ as the percentage of respondents who say a capability is important but are not taking action today.

- 01 **Data-driven decisions**
We use insights from big data and advanced analytics in workforce decision making **(41%)**
- 02 **Skill gaps**
We use data analytics to predict and monitor skills gaps in our workforce **(34%)**
- 03 **Remove bias**
We use data analytics to de-bias hiring and rewards **(34%)**
- 04 **Tech-savvy HR**
Our HR leaders have a depth of understanding and insight into the technological landscape **(34%)**
- 05 **Flexible talent**
We are able to engage easily with flexible talent as and when they are needed **(34%)**
- 06 **Manageable workloads**
The workload is manageable enough at our company that employees are able to make full use of their vacation allowance and relax away from work pressures most evenings and weekends **(33%)**
- 07 **Advanced workforce planning**
We use sophisticated workforce planning and predictive analytics **(33%)**
- 08 **Modern career paths**
We have moved away from an ‘up-or-out’ career model towards multiple career paths that cater to diverse employee needs and aspirations **(32%)**
- 09 **Adaptability**
Our talent practices and processes (e.g., rotations, secondments, learning and development opportunities) are designed to nurture employee agility and adaptability **(32%)**
- 10 **Ecosystem of workspaces**
We have designed workspaces to promote well-being, for instance, with spaces for relaxation, recuperation and to accommodate a variety of working styles **(31%)**

Key priorities for action

We've prioritised the key actions that organisations will need to bridge the gap between where they are now and where they need to be in developing the most important capabilities for the workforce of the future, today. These go beyond a focus on skills per se; organisations also need to create an environment that will help people develop new skills and flourish. This will require a professional and adaptable HR function to guide the organisation towards the future. Many companies are not there yet.

1

Create a competitive advantage through a more engaging people experience

Despite all the talk about automation and AI, companies that want to succeed need to focus on harnessing the talents of the workers who won't be replaced by automation anytime soon. It's these people who'll play pivotal roles in how organisations develop, compete, create and innovate – and who will ultimately drive success.

We already know that a good people experience can enhance the customer experience.² It also helps companies keep and attract talent. In this regard, the people experience is as much about workloads, working conditions and how management engages with and seeks to inspire their employees as it is about HR-led programmes such as training. Anxieties over the impact of automation and AI can compound a poor people experience by eroding confidence, adaptability and willingness to learn or innovate, all of which are so vital in today's market.

As automation accelerates, it's important to remember that the fewer people there are carrying out roles in a value chain, the more important each person is, and the more fragile the whole chain becomes if these people become disaffected or leave.

Thirteen out of the top 20 'at risk' capabilities relate to the people experience. Regionally, some of the most significant variations within the people experience centre on workload manageability. It's the number-one 'at risk' capability for participants in North America and the Middle East, and it's a top three risk in Asia. In Western Europe, where it ranks 11th, it is identified as much less of a risk (see Exhibit 3).

People experience, compound noun

'pē-pəl ik-'spir-ē-ən(t)s

1. The environment at work that gives people their sense of purpose, including the way offices are organised, the arrangements for working hours, the commitment by leadership to a mission and the training and support offered by human resources
2. How people feel about the environment in which they work

² "Chick-fil-A is beating every competitor by training workers to say 'please' and 'thank you'," Business Insider, 2016, <http://uk.businessinsider.com/chick-fil-a-is-the-most-polite-chain-2016-10?r=US&IR=T>



People experience is at risk around the world

Exhibit 3: Top three 'at risk' capabilities by region

	1st	2nd	3rd
Global	Data-driven decisions We use insights from big data and advanced analytics in workforce decision making	Skills gaps We use data analytics to predict and monitor skills gaps in our workforce	Remove bias We use data analytics to de-bias hiring and rewards
Africa	Virtual working We actively support remote and virtual working for everyone whose job role allows for it	Data-driven decisions We use insights from big data and advanced analytics in workforce decision making	Work-life balance We attract talented people by providing a good work-life balance and flexibility over hours and working locations
Asia	Data-driven decisions We use insights from big data and advanced analytics in workforce decision making	Flexible talent We are able to engage easily with flexible talent as and when they are needed	Manageable workloads The workload is manageable enough at our company that employees are able to make full use of their vacation allowance and relax away from work pressures most evenings and weekends
Australasia	Skills gaps We use data analytics to predict and monitor skills gaps in our workforce	Social network We have a robust virtual social platform and/or cloud technology that enables collaboration between employees	Data-driven decisions We use insights from big data and advanced analytics in workforce decision making
Central and South America	Data-driven decisions We use insights from big data and advanced analytics in workforce decision making	Skills gaps We use data analytics to predict and monitor skills gaps in our workforce	Flexible talent We are able to engage easily with flexible talent as and when they are needed
Middle East	Manageable workloads The workload is manageable enough at our company that employees are able to make full use of their vacation allowance and relax away from work pressures most evenings and weekends	Remove bias We use data analytics to de-bias hiring and rewards	Work-life balance We attract talented people by providing a good work-life balance and flexibility over hours and working locations
North America	Manageable workloads The workload is manageable enough at our company that employees are able to make full use of their vacation allowance and relax away from work pressures most evenings and weekends	Remove bias We use data analytics to de-bias hiring and rewards	Tech-savvy HR Our HR leaders have a depth of understanding and insight into the technological landscape
Western Europe	Data-driven decisions We use insights from big data and advanced analytics in workforce decision making	Adaptability Our talent practices and processes (e.g., rotations, secondments, learning and development opportunities) are designed to nurture employee agility and adaptability	Tech-savvy HR Our HR leaders have a depth of understanding and insight into the technological landscape



Tackle 'burnout' and foster vitality

Many people work in hyper-paced, extremely demanding work cultures, where stress and the risk of burnout are rampant. Although the corporate response in recent years has been to provide company wellness initiatives, sustainable change will only occur if work itself is redesigned so that it delivers vitality in an environment that is conducive to maintaining productive energy levels. Three-quarters of respondents believe managing workloads is important, but only half say they are working to do something about this.

Providing employees with periods of recovery will become increasingly important, as longer working lives require people to retain their energy for career marathons, not sprints. Workers also need the right environment to enhance their performance. Organisations should:

- ensure that people take rejuvenating vacations or sabbatical time away from work
- promote short breaks during the workday to improve performance
- enable employees, if possible, to choose when and where they work
- create an effective ecosystem of working environments across the physical and virtual domains.

72%

of companies aspire to **better workplace design**

Build social resilience

Social resilience is our ability to adapt and thrive in an uncertain world. Building it up creates benefits, such as collective coping capacity and group memory, and serves the need for human relationships, which, in turn, reduces stress. Although most companies understand this, only half say they are taking actions to support social resilience. New models of working can create flexibility, but they often reduce opportunities for interactions and relationships. Organisations have an important role in enabling social connectedness and building social resilience in their people.

Overcoming this challenge demands a transformation in the way organisations connect people. For example, organisations could embed collaborative technologies, such as enterprise social networks, deep into processes and explicitly explore ways to develop non-workplace relationships.

Organisations, as Lynda Gratton of London Business School has described, need to help their people:

- nurture the 'posse' – the close colleagues and work friends that people rely on
- build the 'big ideas crowd' – the weak ties that people turn to for inspiration and validation of their ideas
- facilitate the 'regenerative community' – the strong ties with family and close friends that workers need to invest in for their mental well-being.

80%

of respondents say they know **teamwork and collaboration** will power work in the future

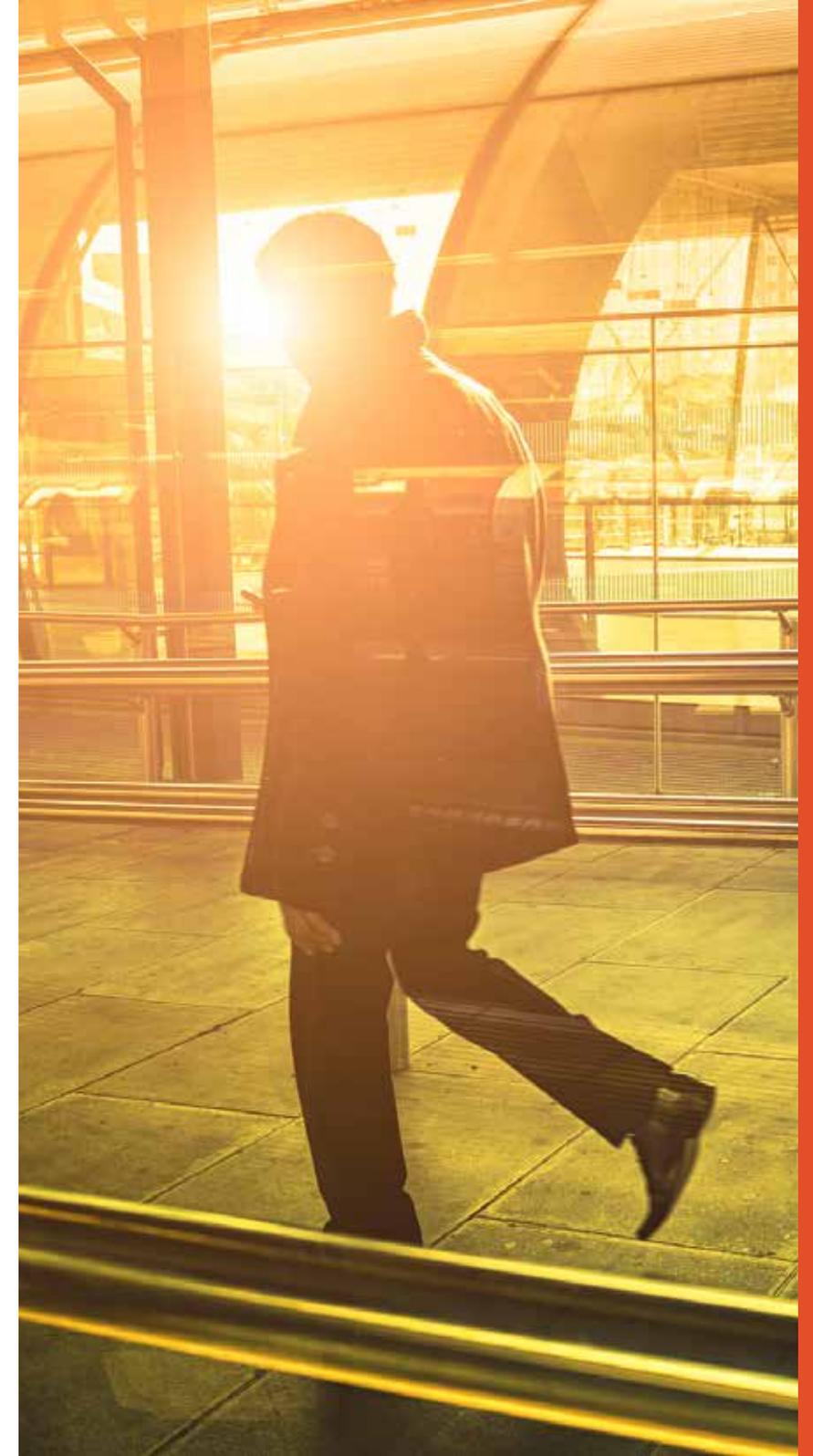
Nurture agility and adaptability

How can businesses help people thrive through change? Increasing life expectancy and the profound disruption of skill sets and career paths by technology mean that every individual will need to develop the capability to adapt quickly and confidently. One-third of respondents to the survey say that developing adaptability and agility in their workers is important, but they also admit they are taking no action today to do this. The companies most likely to succeed tomorrow are those that deliver lifelong learning for their workers. To do this, organisations will need to communicate that change is inevitable and then provide their workers with the diverse experiences that broaden their skill sets to make them more resilient. Organisations should:

- set the expectation that change is a constant and that the 'skills to change' are valued
- provide 'just-enough, just-in-time and just-for-me' learning
- create internal mobility
- make 'career customisation' a reality.

58%

say they don't have programmes to make best use of **talent across borders**



Support 'intrapreneurship'

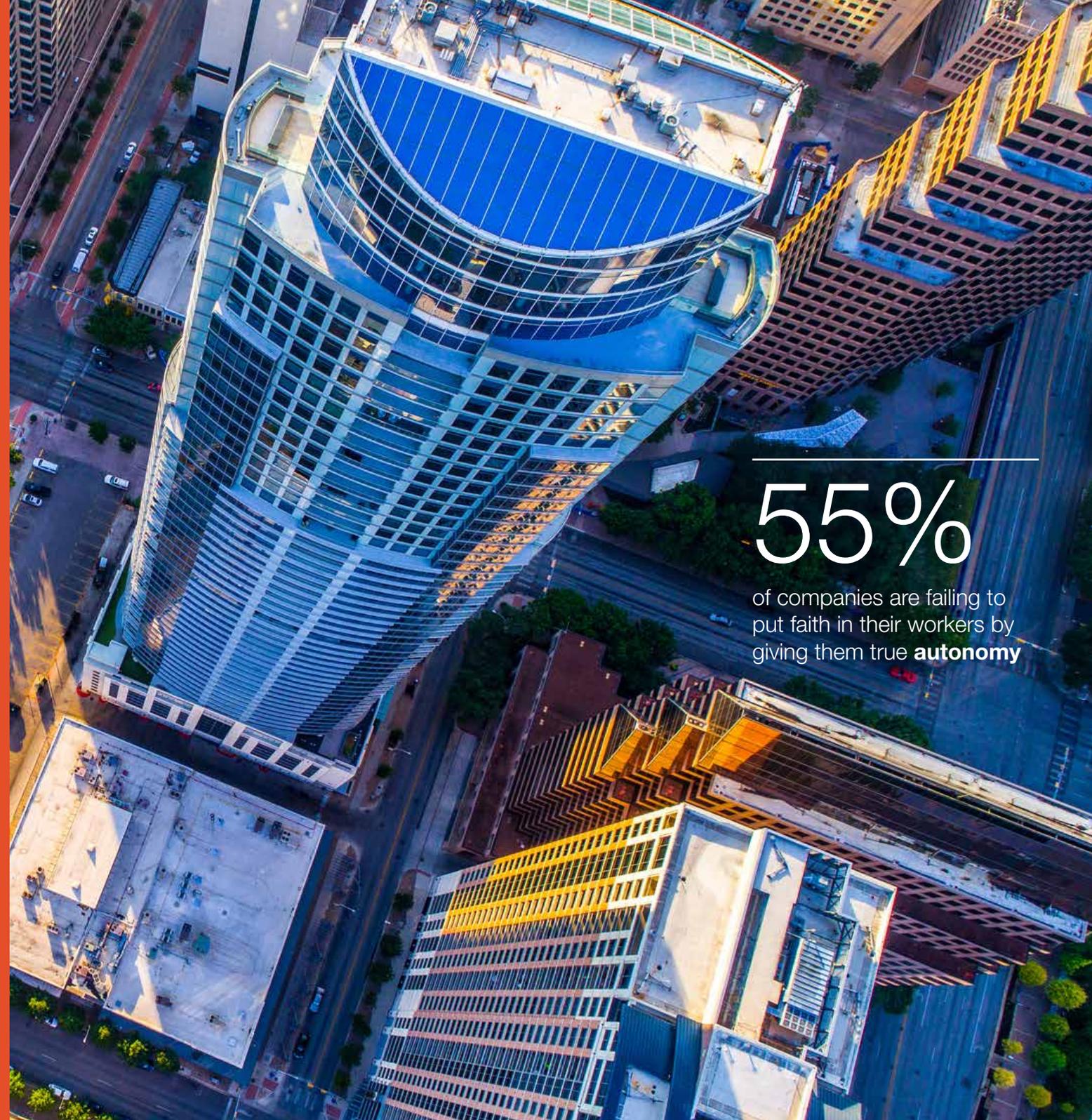
People increasingly want to feel that their contributions count. Organisations can replicate a startup's ability to innovate and create new business opportunities through their own internal startups: so-called 'intrapreneurship.' Organisations that fail to create opportunities for 'intrapreneurs,' and just under half of the respondents say they are not doing this, risk losing innovative team members and their ideas. To avoid this, organisations should:

- create psychological safety, including support from leaders to take risks
- provide time and avenues for idea generation
- create recognition for attempts that don't succeed.

Provide autonomy

The desire for flexibility is a desire to be in charge. Providing autonomy is increasingly important in attracting and retaining talent. The gap between what organisations believe is important and what they can do in this area is one of the largest in the survey. To bridge this gap, corporations need to understand that autonomy must come with clear expectations and measurable objectives and goals, so people can make the right decisions about working on their own. When organisations are more inclusive and transparent about their strategy, then workers can make better decisions that align with organisational goals. Organisations should:

- balance autonomy with clear accountability
- encourage and reward leadership to empower their people
- cultivate transparency around strategic direction and performance
- make nurturing trust throughout the organisation a priority.



55%

of companies are failing to put faith in their workers by giving them true **autonomy**

People experience versus employee experience

Organisations today are looking more broadly at the experience of their wider workforce, whether that workforce is employed, on contract or consists of other flexible talent that may be hired for specific tasks. We call this overall approach to workforces the 'people experience.'

'Employee experience' is the traditional relationship between employer and employee that both parties usually expect to last for years. It still has relevance as a clearly defined subset of an organisation's people experience – and organisations need to remain mindful of employment risks and regulations that could be blurred with a one-size-fits-all approach or lack of care.



Move beyond good practice

Organisations should constantly challenge themselves to determine what's working in their people experience and to develop and test 'signature processes' that best reflect their unique starting point, history and values. It is not enough to just emulate industry 'good practices' or what works elsewhere. Organisations also need to enhance their own people experience and ensure they remain relevant as the workplace and marketplace evolve.

Be mindful about the unintended consequences

Organisations must think carefully about the impact of initiatives, such as encouraging off-site working. In some cases, this can lead employees to feel they need to be on-call 24/7 to prove themselves. There can also be a fine line between autonomy and isolation. Getting this wrong will sap vitality and social resilience. At the same time, too much surveillance can erode autonomy and trust. Organisations should consider their people experience in the round. Feedback from employees to track progress and identify any unwanted impacts is vital to success.

50%

of companies say **workloads are manageable**

2

Use workforce analytics to make the most of your talent

Data analytics and particularly predictive analytics can give businesses a critical edge in gauging future talent needs, understanding how to create a compelling people experience and eliminating potential biases in selection, assignment and appraisal.

Yet, despite the importance organisations attach to data analytics in planning and supporting the workforce of the future, the wealth of data they hold, and the growing sophistication and usability of the tools on offer, many organisations tell us they are falling short: four of the top ten 'at risk' capabilities relate to workforce analytics (see Exhibit 4).

Participants in North America report stronger progress in these areas and are therefore at less risk than their counterparts in other parts of the world, especially Asia and Western Europe. Almost all industries are finding it difficult to make headway with data and analytics. The exception is health, where data is used in skills identification and tackling biases in hiring and reward.



“Organisations need to invest in digital tools to drive people decisions. It’s a ‘no regrets’ move to prepare for the future. But baseline data needs to be accurate. The challenge today is that job descriptions don’t reflect what people do.”

Bhushan Sethi, Joint Global Leader, People and Organisation, PwC US

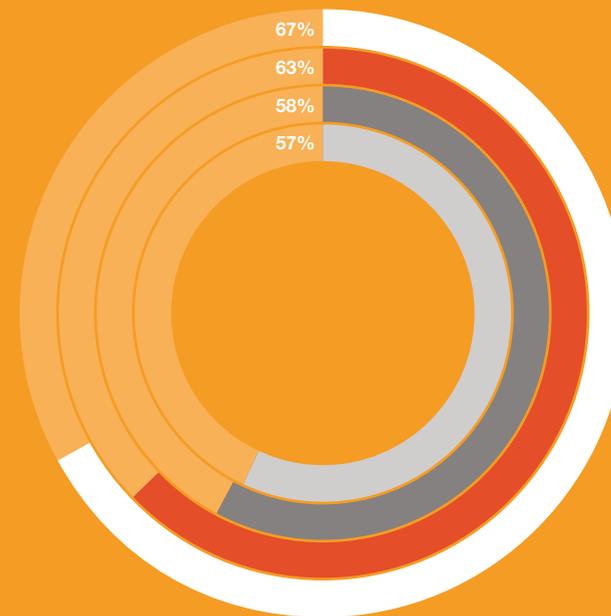


Organisations know data analytics is important – but they are struggling to maximise its use

Exhibit 4: The percentage of respondents who rated data analytics as important compared with the percentage taking action

Question: How important are the following to the future of your organisation? ('Extremely High Importance' or 'High Importance')

Question: To what extent do you agree or disagree with these statements right now? ('Strongly Agree' or 'Agree')



38%

use data analytics to predict and monitor skills gaps in the workforce

27%

use insights from big data and advanced analytics in workforce decision making

31%

use sophisticated workforce planning and predictive analytics

28%

use data analytics to de-bias hiring and rewards

- We use data analytics to predict and monitor skills gaps in our workforce
- We use insights from big data and advanced analytics in workforce decision making
- We use sophisticated workforce planning and predictive analytics
- We use data analytics to de-bias hiring and rewards

Apply analytical rigour

Analytical tools can sharpen the precision and proactivity of talent planning and performance management and then speed up the response. Build the right approach by investing in:

- the recruitment and development of HR talent with quantitative data modelling skill sets as well as the ability to interpret data and understand its business implications
- HR technologies that include visualisation capabilities to help communicate analysis and promote feedback from leaders and staff.

Personalise the experience

What people do outside work affects the way they approach their jobs. They increasingly want their own experience, designed around their needs and aspirations. Their engagement and interaction within sectors, such as online retail and on-demand entertainment, are raising the bar for such expectations. Employees want the same speed, intuition and customisation they've become accustomed to when dealing with organisations outside of work. Measurement could and should go beyond group-wide assessments and annual employee engagement surveys. Employee data can help employers create a personalised experience. Organisations should:

- augment and personalise the people experience via analytics. For example, they can use organisational network analysis (ONA), real-life journey maps, the identification of core pain points, skill-mapping, career navigation, listening and well-being tools³
- ensure employees know how their personal data is being used and what it is being used for, and provide opt-out options
- demonstrate the value of personal data through clear communications to encourage people to opt in.

De-bias people processes

Bias is often unconscious, which makes it hard to identify through initiatives such as diversity training and hard to address. Possible solutions range from the greater use of data analytics to promote diversity to the use of 'blind' screening to eliminate potential sources of bias, such as gender; indicators of social backgrounds, such as names of educational institutions; or ethnicity. Some organisations now rely on data-driven algorithms to identify diverse talent. Used the wrong way, people analytics can be just as unfair, particularly if algorithms replicate human biases. Organisations should:

- track rates of hiring and promotion among underrepresented groups to identify biases and target interventions
- set out how to respond to bias and then track and communicate progress
- make effective use of analytics and digital engagement to broaden the talent pool
- avoid algorithmic bias by ensuring decisions are guided by a person trained to understand algorithms, rather than by an algorithm alone.⁴

25%

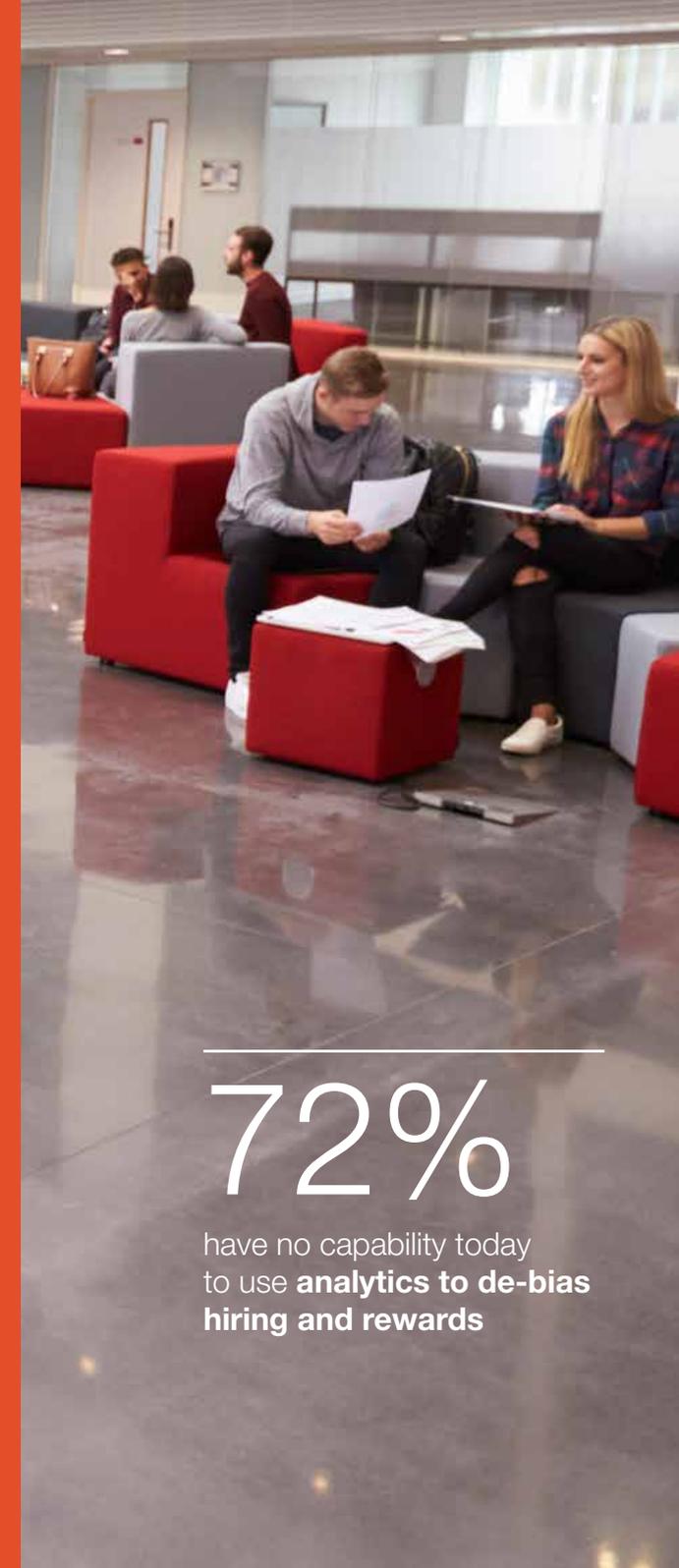
of respondents say **analytics to predict skills gaps** is of 'Extremely High Importance' to their future

72%

have no capability today to use **analytics to de-bias hiring and rewards**

3 Adamsen, A. "People Analytics 3.0," December 18, 2017. https://www.linkedin.com/pulse/people-analytics-30-al-adamsen/?lipi=urn%3Ali%3Apa e%3Ad_flagship3_pulse_read%3BN65EISAaQKSrnapf4%2BBOwA%3D%3D3

4 Mann, G. O'Neil, C. "Hiring Algorithms Are Not Neutral," Harvard Business Review, December 9, 2016. <https://hbr.org/2016/12/hiring-algorithms-are-not-neutral>



3

Bring HR and business leaders together to create real change

HR leaders are more comfortable with their efforts to prepare the workforce of the future than their bosses. In all but three of the capabilities we asked about, a higher percentage of business leaders than HR leaders saw their organisation as 'at risk.' For example, HR leaders report good progress in developing appropriate career development paths, yet only one-third of business leaders agree. Similarly, 60% of HR leaders say they are confident that transparency is reducing concerns about how pay is set, though only 45% of business leaders agree (see Exhibit 5).

Is HR too confident, or is it that business leaders think HR doesn't recognise the business issues, the scope of workforce disruption to come and the need for HR to partner with the business? Whatever the cause for this gap, there's a real need to get HR and business leaders on the same page to accelerate preparations for the future.

Mind the gap

Our findings highlight the clear gap between how HR leaders view their progress and the reality of how it is experienced within the organisation. To bridge the gap, organisations should:

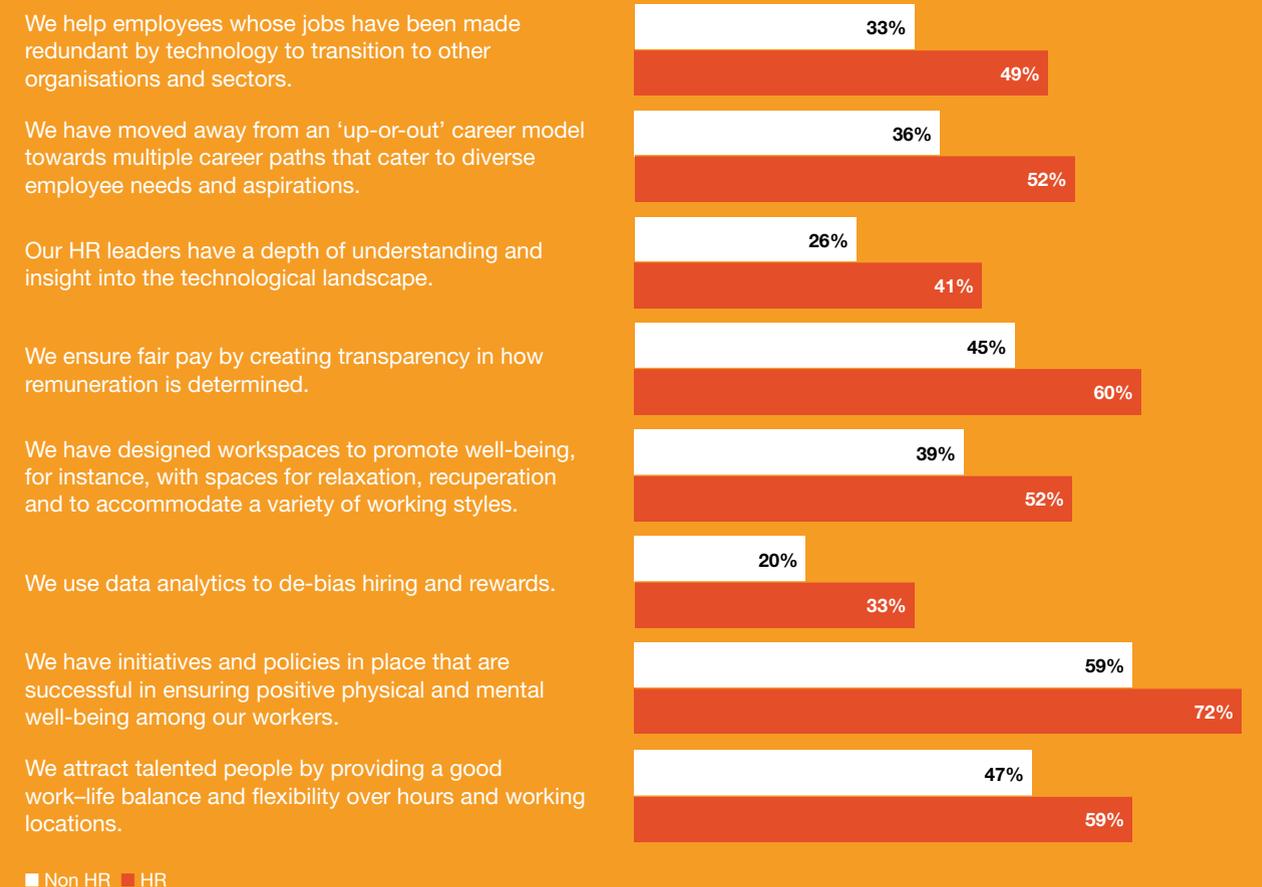
- ensure initiatives aimed at future-proofing the people experience are consistently communicated, lived, understood and felt across the organisation
- coach managers in how to effectively implement initiatives and how to measure and recognise their success
- speak with one voice by ensuring coherent and regular reinforcing signals about the value and importance of these initiatives
- understand the reality: identify the informal practices that allow workers to improve their own experience without HR's help and support what's already working
- encourage HR to lead and help drive the organisation's thinking about the future of the workforce and ensure conversations with HR are inclusive and far reaching.



Business leaders are less confident of progress than HR

Exhibit 5: Top eight organisational capabilities where HR and business leaders are misaligned

Question: To what extent do you agree or disagree with these statements right now? ('Strongly Agree' or 'Agree')



4

With so much to gain from technology, HR needs to step up

Automation and AI will replace tasks, create new roles and change the focus of existing ones. Organisations can benefit from more efficient processes, as repetitive tasks can be off-loaded to allow employees to fill other roles. More than 60% of respondents are mapping areas of repeatable activity and planning options to automate that work today.

Four of the top five 'at risk' capabilities relate to the use by HR of technology to improve the people experience. Overall, 63% of businesses see HR's ability to understand the emerging tech landscape as important but the same number do not think their HR function has that capability today (see Exhibit 6). Infact, only one quarter of the business leaders surveyed are confident that their HR departments are up to speed, compared with 41% of the HR leaders who say they are. And just half of the HR respondents said they do not have a grip on the risks caused by automating work – replacing human work with technology. Without a clear understanding of this, HR will not be well positioned to help plan for and deliver a compelling narrative about the future to workers.

Build HR's understanding of technological change and its implications

HR should be at the forefront of moves towards greater automation and AI, rather than simply responding to changes in technology. Organisations should:

- develop and demonstrate HR's awareness and understanding of technology and bring HR and business leaders together on the issues. This includes integrating HR into technology evaluation and planning from the outset to highlight the people issues. HR needs to step up to add a human dimension to the conversation, accounting for the effects of automation and AI on how people will operate, engage and feel about their work
- ensure HR is trained to use data analytics to predict and monitor skills gaps in the workforce.⁵ This will be an important differentiator for companies facing disruption and change. HR needs people with the analytical skills and business understanding to lead this initiative
- ensure HR has a strong influence on the process of mapping automatable tasks, which includes taking steps to ensure employees are given the opportunity to develop the skills they need to do the jobs of the future.

⁵ Dubben, J. "Brand consultant? PR researcher? Why 'bullshit jobs' era needs to end." <https://aeon.co/videos/brand-consultant-pr-researcher-why-the-bullshit-jobs-era-needs-to-end>



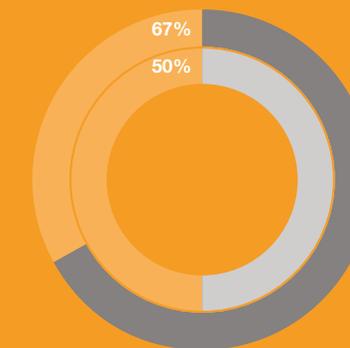
HR needs to do more to understand tech

Exhibit 6: The percentage of respondents who believe HR's understanding of tech is important and the percentage who are taking action today

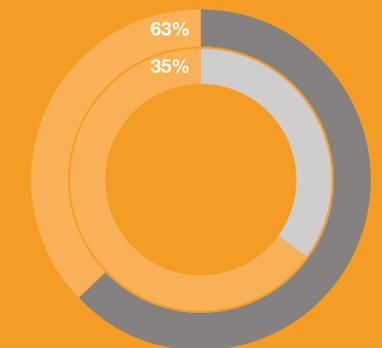
Question: How important are the following to the future of your organisation? ('Extremely High Importance' or 'High Importance'), and
Question: To what extent do you agree or disagree with these statements right now? ('Strongly Agree' or 'Agree')

We are clear on the potential risks caused by decisions to replace human work with technology

Our HR leaders have a depth of understanding and insight into the technological landscape



■ Importance
 ■ Taking action



■ Importance
 ■ Taking action

5

Harness the potential of flexible talent and innovation

Ways of working and people's relationships with organisations are becoming more fluid. The number of contractors, freelancers and portfolio workers is increasing. In 2010, it was estimated that by 2020 more than 40% of the American workforce, or 60 million people, would be independent workers.⁶ We are on track: figures from 2017 show 36% of the workforce, or 57.3 million people, called themselves freelancers, with more than 50% of millennials falling into this category.⁷ More tie-ups between large organisations and smaller startups are also providing ready access to innovation and talent on demand.

Identifying where and how to engage flexible talent will become increasingly important for organisations, yet few are prepared for this shift. Sixty-seven percent of organisations have the desire to make use of people who work off-site or at times to suit them but they're struggling to do so. Only 8% of respondents strongly agree that their organisations can engage easily with this valuable resource when needed. Further, 58% of respondents say they have no capability to use open innovation and crowdsourced ideas, and only 9% agree strongly that they can do this. It's clear that organisations need to do more to take advantage of the ideas and skills from the wider market – not just from their traditional employee base (see Exhibit 7).

⁶ "Twenty Trends That Will Shape the Next Decade," Intuit 2020 Report, October 2010.

⁷ "Freelancers predicted to become the U.S. workforce majority within a decade..." Upwork, October 17, 2017. <https://www.upwork.com/press/2017/10/17/freelancing-in-america-2017/>

58%

of respondents are not taking action to include more **freelancers, consultants and contractors** in their talent mix





Falling behind on engaging flexible talent and new ideas

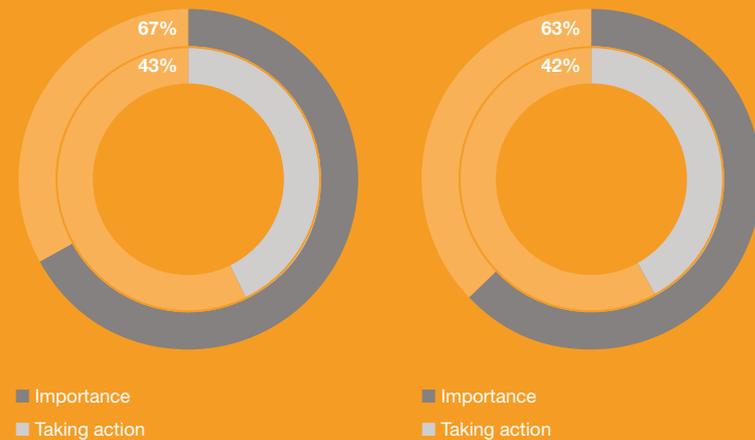
Exhibit 7: Respondents that say new ways of accessing talent are important compared with those who say they are taking action now

Question: How important are the following to the future of your organisation? ('Extremely High Importance' or 'High Importance'), and

Question: To what extent do you agree or disagree with these statements right now? ('Strongly Agree' or 'Agree')

We are able to engage easily with flexible talent as and when they are needed

We use open innovation and crowdsourcing to generate ideas from people and institutions outside of our organisation



Think differently

Unconventional approaches to recruitment are needed to build an ecosystem of independent talent. Organisations should:

- identify which skills they need and where people with such skills congregate
- cast a wider net. For example, some companies are now posting job adverts in virtual gaming worlds to get the attention of the best coders and technical experts who hang out there, rather than on traditional job search sites
- crowdsource ideas. Crowdsourcing is not a new concept, but it could be better used to help people share ideas. We believe that companies that use the connectivity of the Internet and intranets to crowdsource ideas will have an advantage. In the survey, 63% of respondents recognised this as an important capability, but only 42% said they were acting to encourage this now.

Build engagement and trust

Although the rise of the gig economy reflects many people's desire for greater choice, variety and flexibility, for others it may be the only way they can secure work and is certainly not their preference. A high proportion of people on insecure contracts are women, people from ethnic minorities and other traditionally economically marginalised groups. Creating fair employment and building trust around this are therefore vital. Organisations should:

- identify and tackle the working conditions and aspects of organisational culture that do not meet today's societal standards
- stay ahead of changes in societal expectations and judge today's behaviours by tomorrow's standards. This requires diverse views and perspectives – from outside of the organisation, from customers and partners to competitors and non-governmental organisations – to ensure that outdated approaches are challenged.⁸

9%

of respondents 'Strongly Agree' they have the **capability to crowdsource ideas** today

⁸ Snyder, V. "Rethinking Culture Fit to Avoid the Echo Chamber Effect," Forbes, January 16, 2018.

6

Get your story straight

Organisations can't protect jobs that are made redundant by technology – but they do have a responsibility to their people to prepare them for the future. These are business issues that demand vision and leadership from the top.

HR has a critical role to play here, but it must be mindful of the effect these changes are likely to have on employee motivation, well-being and sense of self, and have a real understanding of the technological opportunities and challenges ahead. Based on the survey responses, it appears HR is not prepared for these changes (see Exhibit 8).



“It is important for business leaders and HR to work together to produce a strong people-centred narrative about how jobs in their organisation will change. A clear vision of how technology will change the way their people work and the strategies needed to help them prepare is required.”

Carol Stubbings, Joint Global Leader, People and Organisation, PwC UK

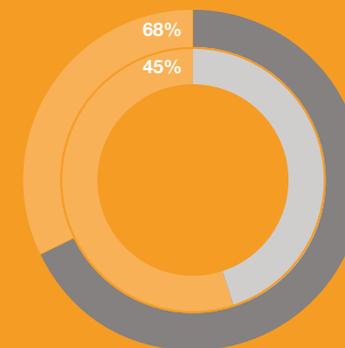


Openness and transparency are needed to build engagement and trust

Exhibit 8: The percentage of respondents who believe clarity about the future of work is important and the percentage who are taking action today

Question: How important are the following to the future of your organisation? ('Extremely High Importance' or 'High Importance'), and **Question:** To what extent do you agree or disagree with these statements right now? ('Strongly Agree' or 'Agree')

We have created an open and transparent narrative on how we are preparing for the future of work – including the anticipated impacts of automation and AI on our workforce



■ Importance
■ Taking action





Build a clear narrative about the future

The power of narratives is rooted in what they say about the identity, future and purpose of an organisation. They are more than a regurgitation of facts and statistics. A narrative of the future of work needs to show that you have considered what work will mean in your company. It's important to communicate a clear, compelling and honest story about how the business and its leadership are influencing, planning and delivering on the future of work – for the organisation, society and individuals. Yet only 10% of respondents strongly agree that their organisation can anticipate impacts of automation and AI on the workforce and plan for the future. Organisations should:

- promote an open dialogue with the workforce about the future to ensure diverse perspectives are represented and people feel part of the journey
- develop programmes that enable workers displaced by technology to be re-skilled or redeployed internally, when possible, and to develop the skills and contacts that would enable them to gain work elsewhere when necessary.

Be honest about what's important

Despite the importance of acknowledging uncertainty, organisations need to be thoughtful about which areas require clarity. If a narrative on the future of work is telling a story about who you are as an organisation, this story should show which areas are non-negotiable. This may be recognising that jobs will be lost or that flexibility cuts both ways: long hours may sometimes be needed, but employees should be able to choose when and how they work. Or it may be demonstrating to your people that a sense of purpose and meaning will remain core to the work, even as the actual tasks they do transform. The importance lies in setting out these non-negotiables and providing a sense of transparency and honest dialogue to your people, in the face of job disruption and change.

10%

of respondents 'Strongly Agree' that they have a **clear narrative about the future of work**

Building trust and taking action: the first steps

Societies now expect businesses to not only generate profits but also improve economic and social conditions within communities. In the area of trust, 83% of respondents think they're delivering: they feel their organisations are trusted by society, customers and employees (see Exhibit 9).



CEOs agree. In the 2018 CEO survey, the majority (57%) said they've not experienced a decline in trust between the workforce and leadership.⁹ Greater disclosure of information on pay gaps and the representation of women and minority groups at senior levels is helping in this area. Transparency also applies to the effects of automation on the jobs and workers. Sixty-four percent of respondents said they are mapping areas of repeatable activity. But they need to be much clearer about how they are communicating what life in a new AI and data-enhanced world will look like – and to share this information in a sensitive way.

On the capabilities that respondents said were most important for future success – building trust, supporting human skills and employee well-being, there is some progress. But we would argue that though these are good first steps, they are only a start. All of the 45 capabilities that we identified have a role to play in the success of an organisation. It's important to prioritise them based on sector and capacity, but it is also important to be aware of the gaps. It's time to develop a strategy for what has to be done next.

91%

of respondents see being an organisation **trusted by society** as important to their future

⁹ "21st CEO Survey Report," PwC, 2018. <https://www.pwc.com/gx/en/ceo-survey/2018/pwc-ceo-survey-report-2018.pdf>



There's good news, too

When it comes to trust and doing right by their employees – for example, by focusing on diverse talent pools – it's clear that organisations are performing well.

Exhibit 9: Ten areas where organisations are least 'at risk'

Question: How important are the following to the future of your organisation? ('Extremely High Importance' or 'High Importance'), and **Question:** To what extent do you agree or disagree with these statements right now? (those who do not agree)

- 01 **Trusted by society**
We are an organisation that's trusted by society, our customers and our employees
- 02 **Re-hiring alumni**
It is common for our company's alumni to rejoin the company as employees, contractors or consultants after they have left
- 03 **Human skills**
We highly value, develop and reward 'human' skills such as leadership, creativity, empathy and curiosity
- 04 **Mapping to automate**
We're mapping areas of repeatable activity and our options to automate them
- 05 **Purpose-led**
We make decisions on the automation of tasks and jobs based primarily on how best to deliver our corporate purpose
- 06 **Global talent**
Our sourcing and talent management strategies recognise the need to compete in a global talent market
- 07 **Future scenarios**
We use a scenarios-based approach to plan for multiple visions of the future
- 08 **Social mobility**
We have a number of community outreach, internship and apprenticeship programmes in order to recruit people from less privileged and/or more diverse backgrounds
- 09 **Older workers**
Hiring, engaging and retaining workers over the age of 60 is a key part of our company's people strategy
- 10 **Re-skilling**
We nurture re-skilling and continuous learning to help workers remain employable



Gain insights from employees

For some organisations, the automation mapping process is a top-down exercise; others are inviting employees to contribute. We advocate the latter approach for greater inclusivity. For example, Aviva plc empowered 16,000 of its staff to identify elements of their role that could be automated so that they could be trained in a higher skill function.¹⁰ Here, the organisation is making inclusive automation decisions based on purpose and on embracing continuous learning to help workers remain employable. In the survey, organisations said they are acting on both of these capabilities today.

Incentivise development

Employees should also be incentivised to develop the skills that will enable them to add value and be employable in the future. This includes building soft skills alongside digital skills. More than three-quarters of respondents report that re-skilling, using continuous learning and effective incentives are high on the corporate agenda. The rise of learning platforms in organisations, enabling peer-to-peer information sharing and the ability to set up communities around content are some examples of what is happening now.

Tapping into diverse talent pools

Traditional talent practices can inadvertently filter out diversity and sideline older workers. Today, the need to access diverse talent pools is multiplied by a decline in new workers entering the workforce in most Western markets. Organisations are looking to retain relationships with employees that leave, as they often return later, and 60% ranked having community outreach, internship and apprenticeship programmes to recruit people from less privileged and/or more diverse backgrounds as very important. More than half said they were doing this already. The survey showed that 35% of respondents said it was very important to make hiring, engaging and retaining workers over the age of 60 a key part of their people strategy, and one-fifth said they were actively doing this.

A broader view of inclusivity

Today's workers want to be included and feel they have ideas and experience to add to the business decisions within their organisation. Inclusivity beyond diversity is important, and how organisations make their workers feel they are involved and are helping to shape the future will be a key part of the people experience for tomorrow.

¹⁰ Donnella, A., "Insurer asks 16,000 staff: could a robot do your job?" The Times, February 26, 2017. <https://www.thetimes.co.uk/article/insurer-asks-its-16-000-staff-could-a-robot-do-your-job-2jj5nskxl>

Conclusion

The question is no longer if, or even when, the workforce will be transformed. It's happening now. The key point is how quickly business and HR leaders can gauge and respond to the implications and prepare their organisations for the future.

Bringing together the skills, technology and organisational foundations are just the beginning. The real differentiators are the ability to build trust and deliver the people experience that inspires commitment and ultimately maximises the organisation's potential.

People understand that boring, repetitive tasks will be done by robots and that workers whose jobs disappear will need to learn new skills. But if leaders are not clear about their vision and strategy and don't communicate what they plan to do, workers will lose confidence in the organisation and its future.

Our survey reveals encouraging progress but also potentially damaging gaps between understanding the problems and taking actions to solve them; these gaps must be addressed. The key starting point is collaboration between business and HR leaders to develop the big-ambition vision that identifies how to programmatically build the future-ready workforce. To move forward, it's important to challenge what you are doing now to see if it is adding value and to act swiftly to change any programmes that are not. This will ensure that all valuable resources are tightly focused on activities that do, or will, have an impact. Acting on many of the points raised in this report also demands a level of experimentation, perhaps starting small in parts of the firm before scaling up to programmes. It's therefore important to normalise the concept of experimentation and piloting as we adapt to the future of work.

Ultimately, preparing for the future requires action today. Companies that embrace the new realities, recognise the urgency and work with their employees to deal with change will have a powerful advantage.

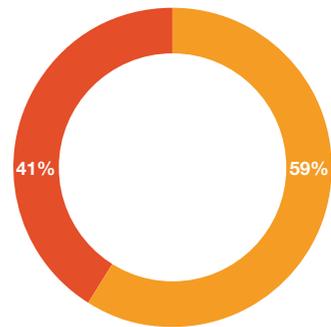


About the survey

We interviewed 1,246 executives in more than 10 industry sectors across 79 countries. Fifty-nine percent of the respondents were HR professionals and 41% were business executives, of which 13% were C-suite-level leaders.

We asked respondents to rate how important 45 specific capabilities are to the future of their business. We also asked them to identify where they are taking action today to develop these capabilities. Their responses enabled us to see the percentage of businesses 'at risk' against each capability – those that are taking no action today in the areas they see as critical for the future.

Respondents

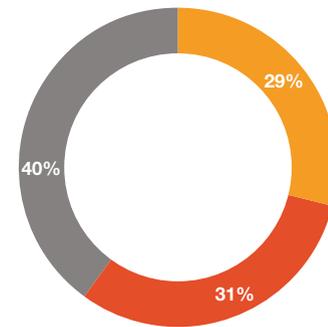


■ HR ■ Non HR

Regions

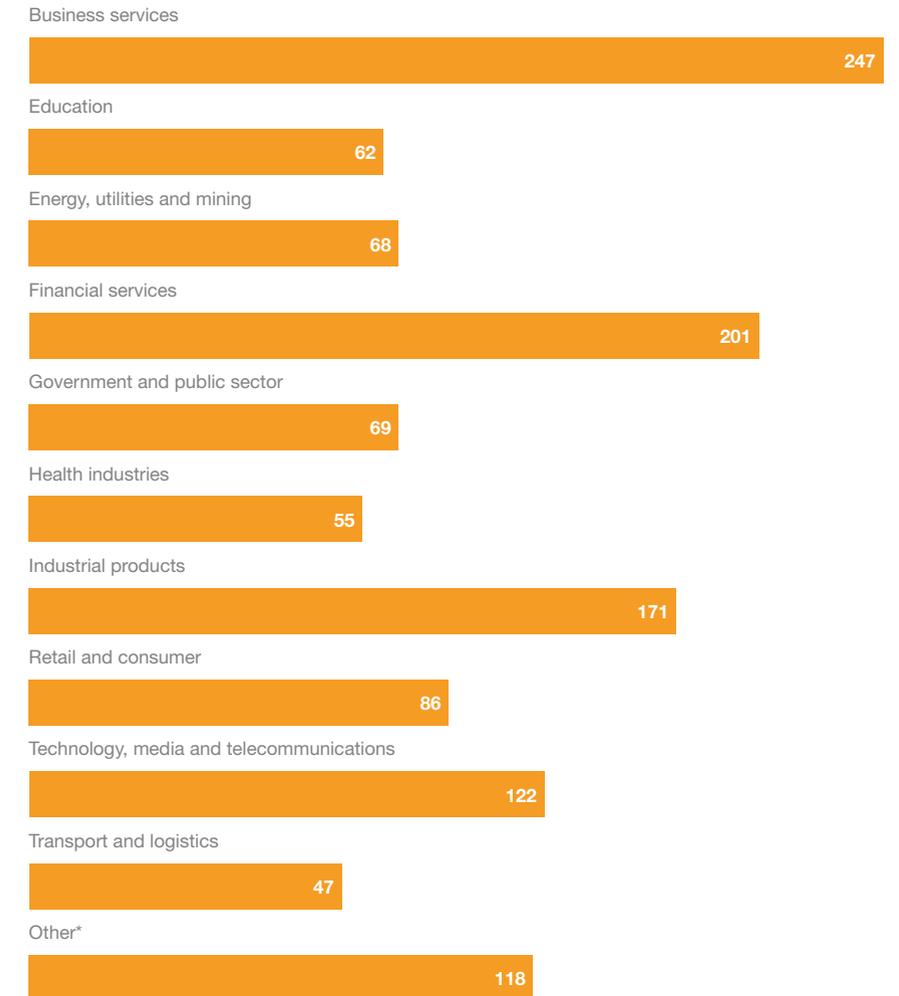


Organisation size



■ > 10,000 employees
 ■ 1,000 – 10,000 employees
 ■ < 1,000 employees

Industries



*Includes agriculture, hospitality and leisure, and others

Question: How important are the following to the future of your organisation? ('Extremely High Importance' or 'High Importance') and **Question:** To what extent do you agree or disagree with these statements right now? ((those who did not agree) We calculated 'at risk' as the percentage of respondents who say a capability is important but are not taking action today.

Planning for the future

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We use a scenarios-based approach to plan for multiple visions of the future.	66.0	18.1
We use sophisticated workforce planning and predictive analytics.	58.3	32.9
We develop our technology, workforce, location/real estate and tax strategies in a coordinated way.	70.9	25.6

Brains and bots in collaboration

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We make decisions on the automation of tasks and jobs primarily based on how best to deliver our corporate purpose.	71.0	16.4
We're mapping areas of repeatable activity and our options to automate them.	67.9	16.3
We're identifying and building the future skills created by the impact of technology.	73.4	22.4
We're exploring how robotics and AI can enable the entire redesign of human work in our organisation.	51.2	20.8
Our HR leaders have a depth of understanding and insight into the technological landscape.	62.7	33.7
We are clear on the potential risks caused by decisions to replace human work with technology.	66.5	26.9
We help employees whose jobs have been made redundant by technology to transition to other organisations and sectors.	61.1	26.0

21st-century skills

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We highly value, develop and reward 'human' skills such as leadership, creativity, empathy and curiosity.	87.1	15.1
We collaborate with educators and policy makers to address the skills mismatch.	67.0	22.4
We nurture re-skilling and continuous learning to help workers remain employable.	75.9	19.8
We use data analytics to predict and monitor skills gaps in our workforce.	66.8	34.3

New talent mix

	Percentage of respondents who say it's important	Percent of companies 'at risk'
We use open innovation and crowdsourcing to generate ideas from people and institutions outside of our organisation.	63.1	27.0
We are changing our talent mix to include more freelancers, consultants and contractors.	53.7	21.2
We are able to engage easily with flexible talent as and when they are needed.	67.2	33.5
It is common for our company's alumni to rejoin the company as employees, contractors or consultants after they have left.	44.4	13.1

Global talent market

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
Our sourcing and talent management strategies recognise the need to compete in a global talent market.	73.2	17.0
We have effective global mobility and collaboration programmes that make the best use of talented people across borders.	63.3	28.7
We recognise pools of key skills around the world and consider our location strategy with access to talent in mind.	62.2	25.8

Value of inclusivity

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We have a number of community outreach, internship and apprenticeship programmes in order to recruit people from less privileged and/or more diverse backgrounds.	60.3	18.4
We have adopted non-traditional assessment and training processes in order to hire and engage talent with physical disabilities and/or neurological differences like autism and ADHD.	39.9	22.4
Hiring, engaging and retaining workers over the age of 60 is a key part of our company's people strategy.	35.2	19.1
We understand the diverse family arrangements and caring responsibilities of employees and offer work-life balance policies accordingly.	74.9	21.9
We use data analytics to de-bias hiring and rewards.	56.9	34.3

Trust and fairness in a transparent world

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We are an organisation that's trusted by society, our customers and our employees.	90.6	9.8
We have created an open and transparent narrative on how we are preparing for the future of work – including the anticipated impacts of automation and AI on our workforce.	68.2	28.7
We ensure fair pay by creating transparency in how remuneration is determined.	76.4	26.4

Well-being: a key productivity driver

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We have initiatives and policies in place that are successful in ensuring positive physical and mental well-being among our workers.	81.5	20.7
It is common practice to take a sabbatical or career break in our company.	45.9	23.9
The workload is manageable enough at our company that employees are able to make full use of their vacation allowance and relax away from work pressures most evenings and weekends.	75.8	33.3
We see it as acceptable for employees to disconnect from work (i.e., not check emails or return phone calls) outside working hours, while on holiday or on weekends, if they choose to do so.	68.2	24.3
We attract talented people by providing a good work-life balance and flexibility over hours and working locations.	77.8	28.5

A connected modern workplace

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We have designed workspaces to promote well-being, for instance, with spaces for relaxation, recuperation and to accommodate a variety of working styles.	71.6	31.3
We actively support remote and virtual working for everyone whose job allows for it.	71.4	25.4
Our working environments are designed to encourage teamwork, collaboration and innovation.	79.3	27.8
We have a robust virtual social platform and/or cloud technology that enables collaboration between employees.	72.6	29.0
We encourage and reward employees for building networks and relationships outside of their function and organisation.	69.1	30.2

Unlocking work performance

	Percentage of respondents who say it's important	Percentage of companies 'at risk'
We have moved away from an 'up-or-out' career model towards multiple career paths that cater to diverse employee needs and aspirations.	71.0	31.6
The performance management practices of our company focus on work and task output and value added rather than hours worked.	80.2	20.8
We have avenues present for employees to offer innovative ideas and support them in turning these ideas into action.	76.6	29.2
Our talent practices and processes (e.g., rotations, secondments, learning and development opportunities) are designed to nurture employee agility and adaptability.	78.0	31.5
Our employees have a high degree of autonomy over how they work (e.g., they can influence which projects they work on, which teams they work with and how they structure their work day).	69.6	30.8
We use insights from big data and advanced analytics in workforce decision making.	62.7	40.7



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Justine Brown (PwC UK)



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Lynda Gratton is a Professor of Management Practice at London Business School, the founder of Hot Spots Movement and leads the Future of Work Research Consortium. Lynda has written extensively about the interface between people and organisations. In 2016, Lynda co-authored 'The 100-Year Life: Living and Working in an Age of Longevity' which was shortlisted for the FT Business Book of the Year award.

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