

Everything we
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....but this is *how* we win

PRESENTED BY:
Phil Fersht, Founder, CEO and Chief Analyst

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Everything we once knew as stable is under assault... but this is how we win

- 1 – How much everything has changed
- 2 – Winning the Talent War steals the market
- 3 – How Services must evolve from Effort to Performance to Purpose
- 4 – Taking the debate to our Leadership Panel

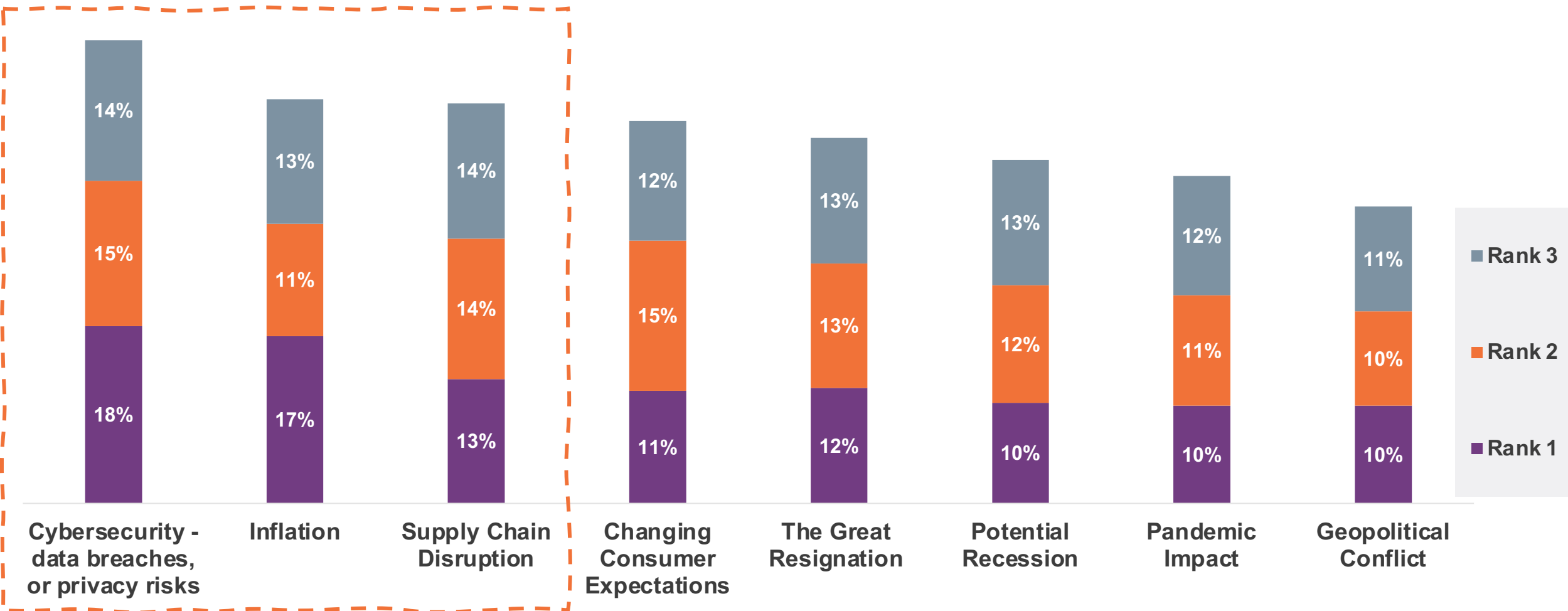
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How much everything has changed



Enterprises are facing multiple macro-economic headwinds and challenges assaulting their strategic goals

What are the most concerning macro-environmental factors adversely impacting your organization's goals?

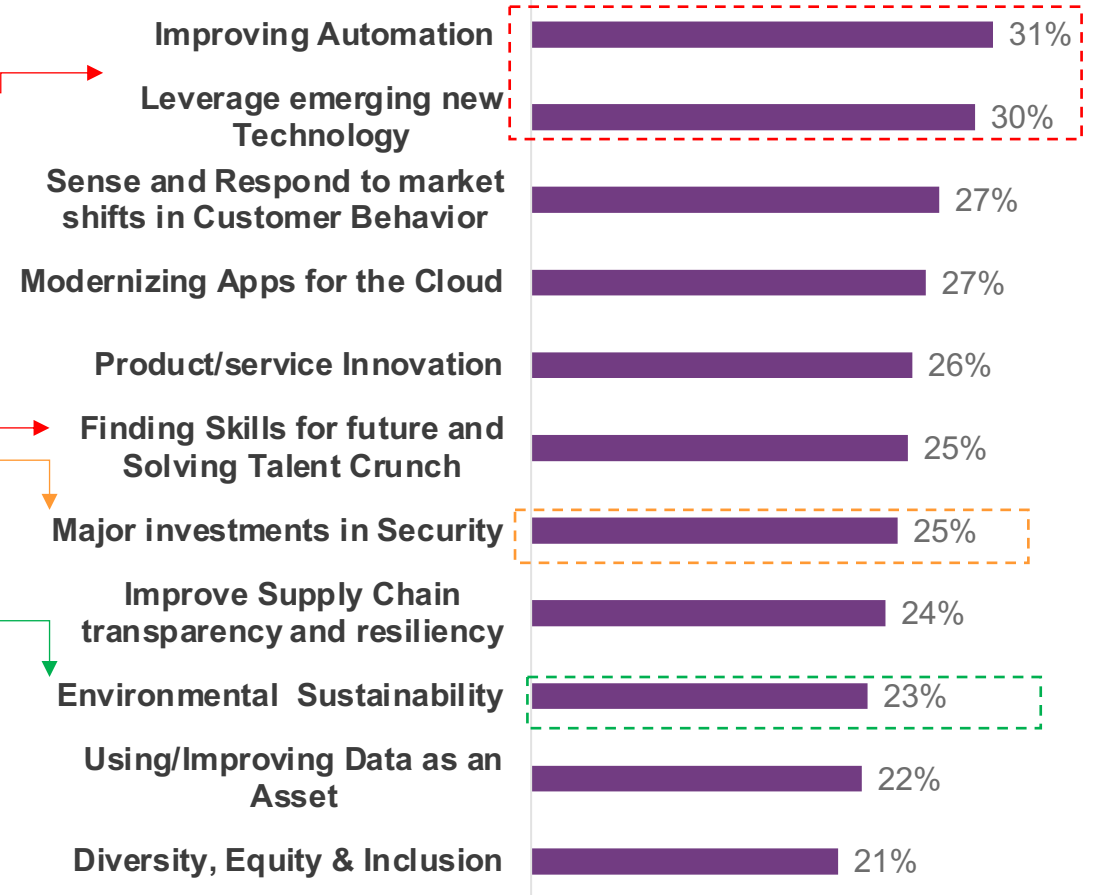


Security, Digital Modernization, and ESG are the main leadership issues... but Automation and Emerging Tech are where the investments are

Importance to the leadership agendas today

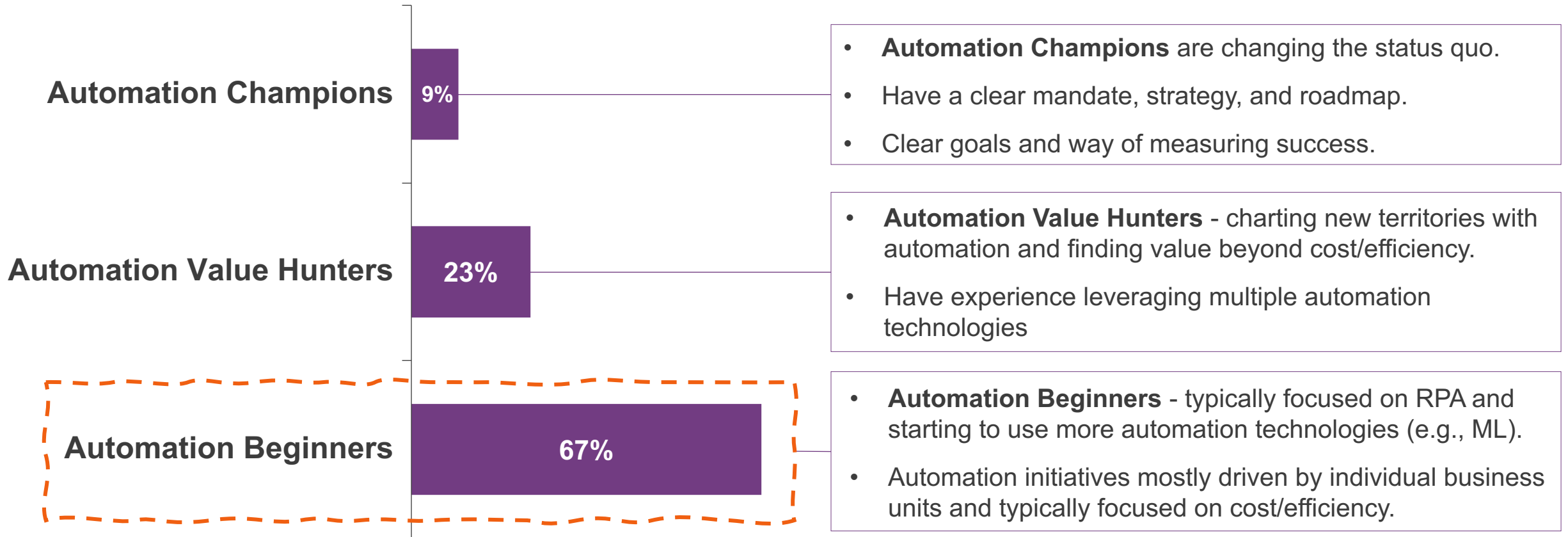


Top initiatives underway to meet strategic priorities



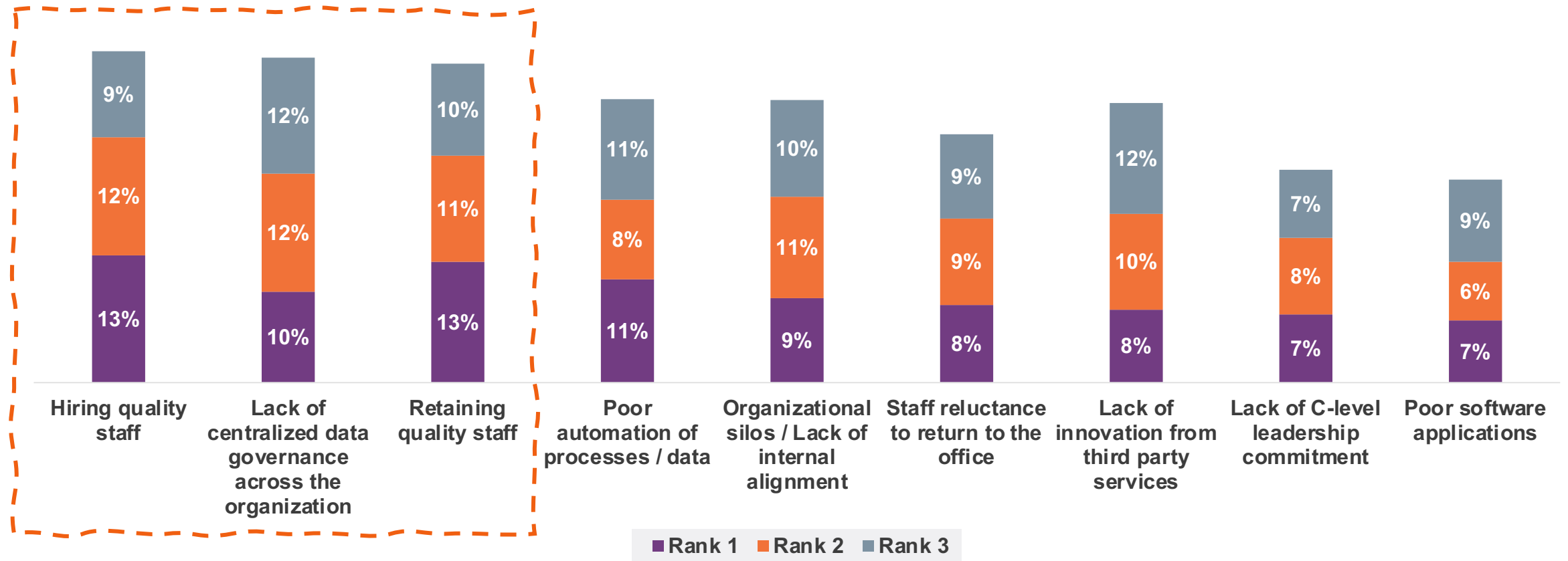
10 years on and we're only just getting started! Nearly 70% of enterprises self-rated themselves as “Automation Beginners”

Which of the following statements best characterizes the overall maturity of your automation initiatives?



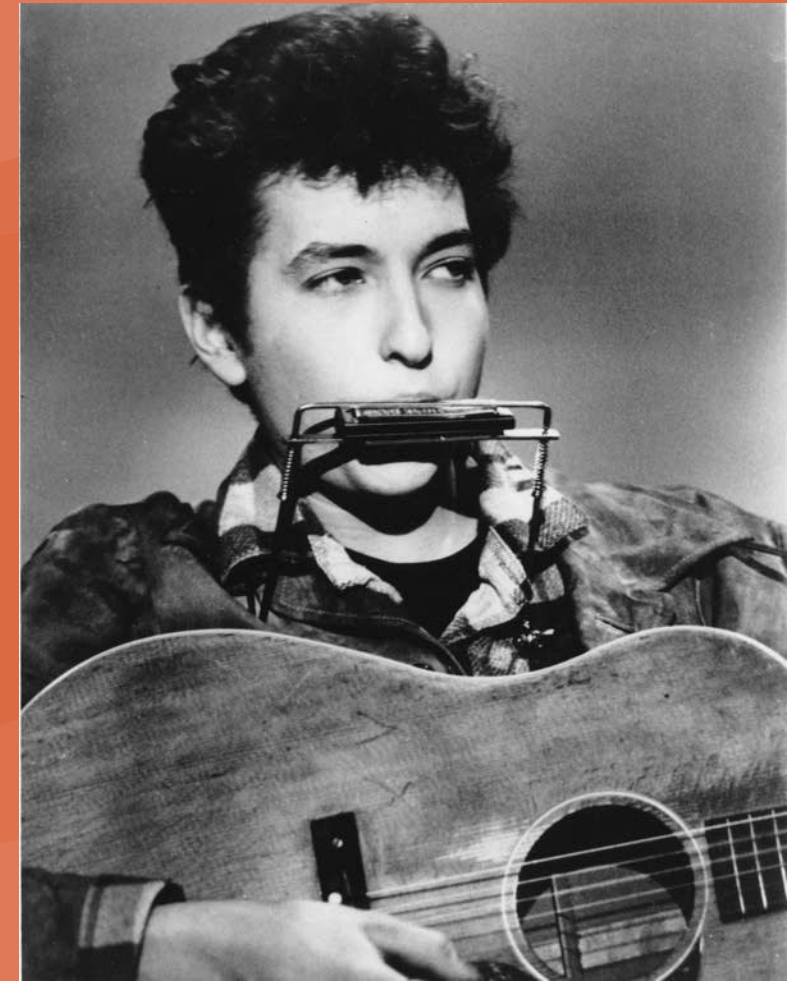
Lack of capable staff and quality data have risen to the top as critical issues

What are your company's internal challenges to meet your strategic objectives?



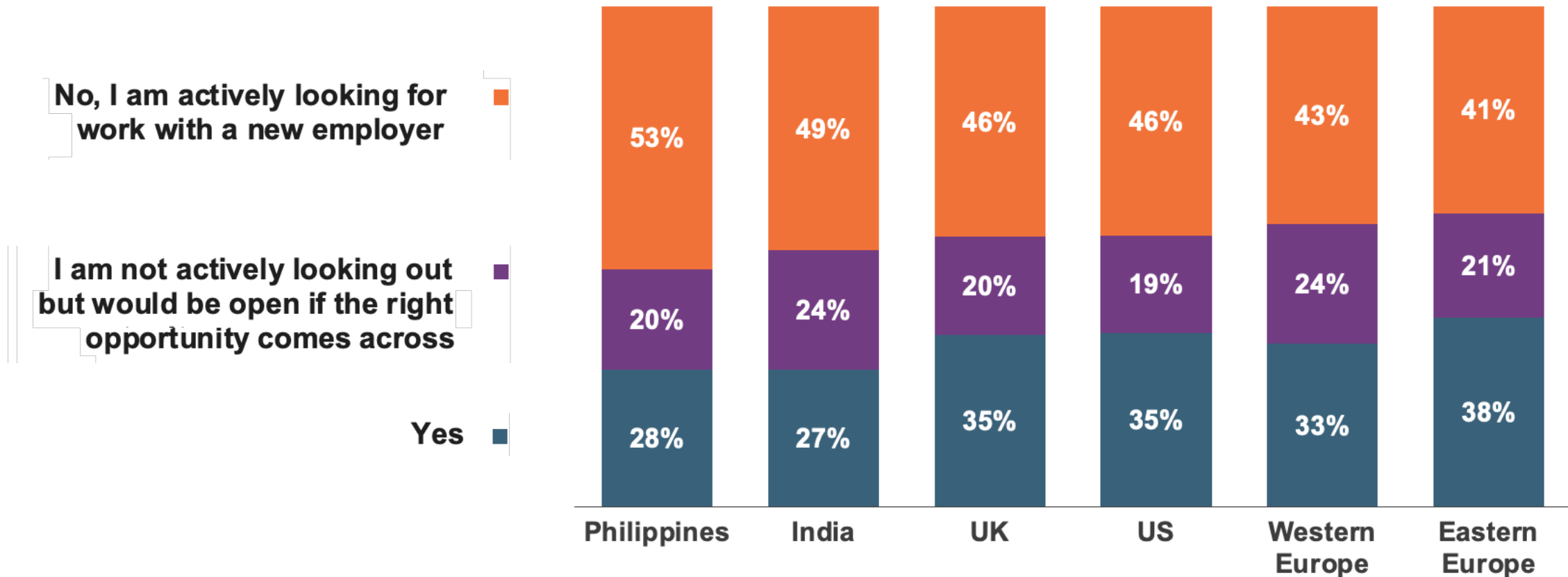
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Winning the Talent War steals the market



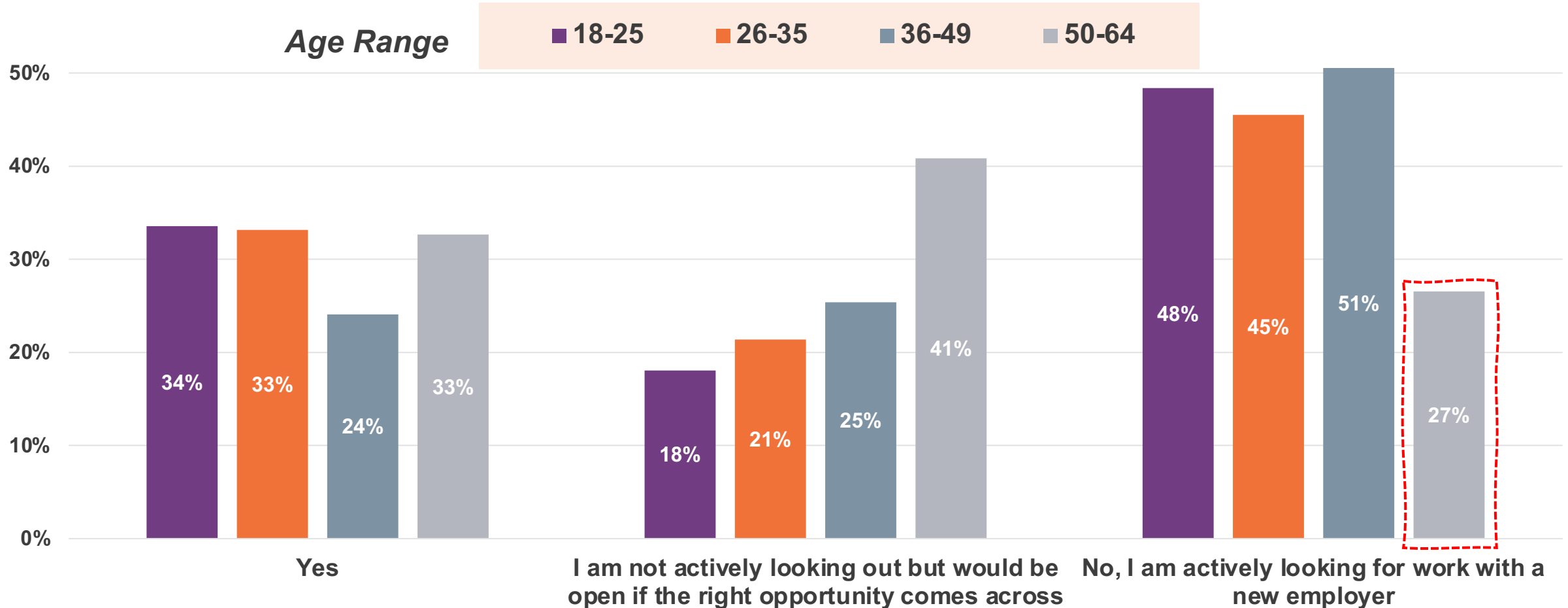
7 out of 10 employees will leave their current employer if/when the right opportunity presents itself... across the globe

Do you intend to be with your CURRENT EMPLOYER for the next 12 months?

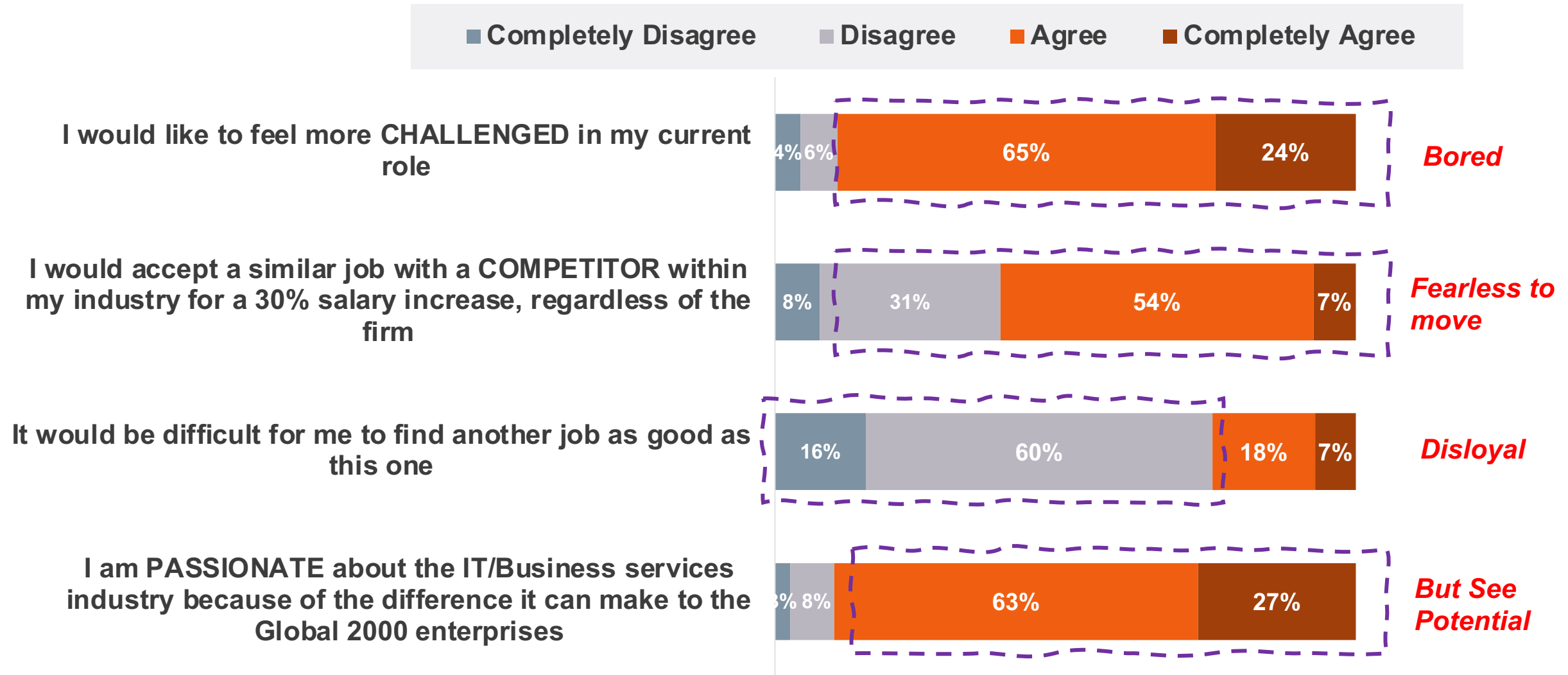


Experienced workers less likely to leave

Do you intend to be with your CURRENT EMPLOYER for the next 12 months?

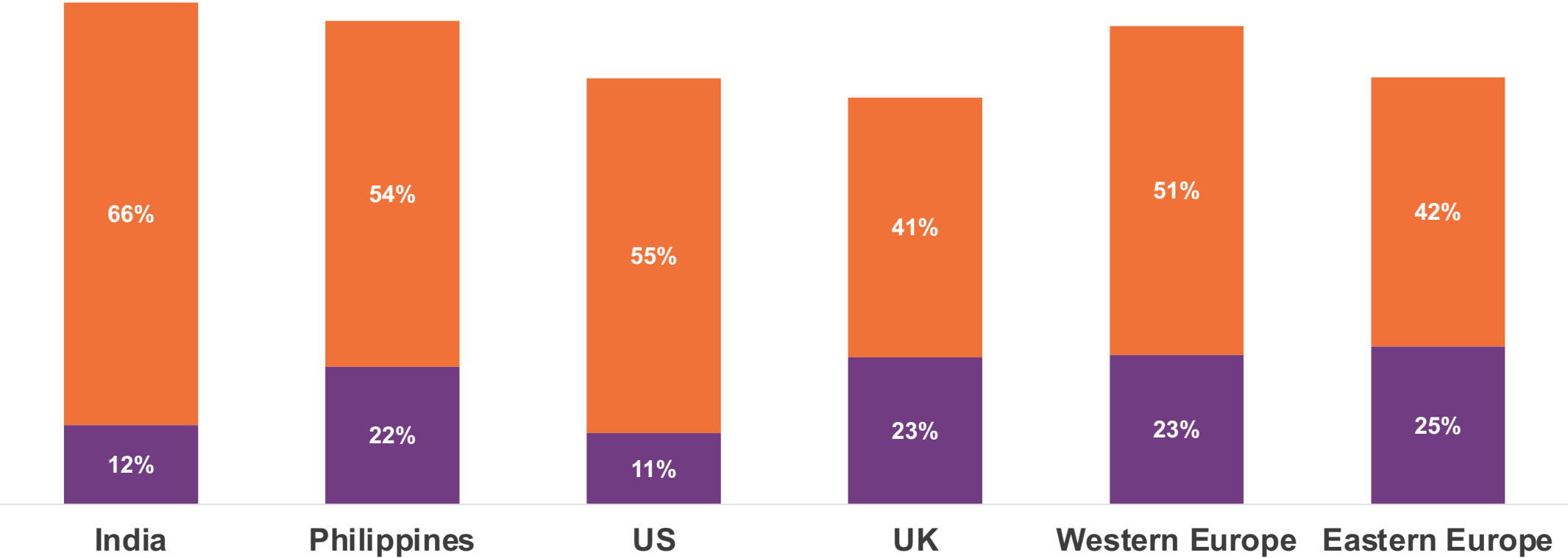


Employees feel under-challenged and are ready to jump ship. But they see POTENTIAL...



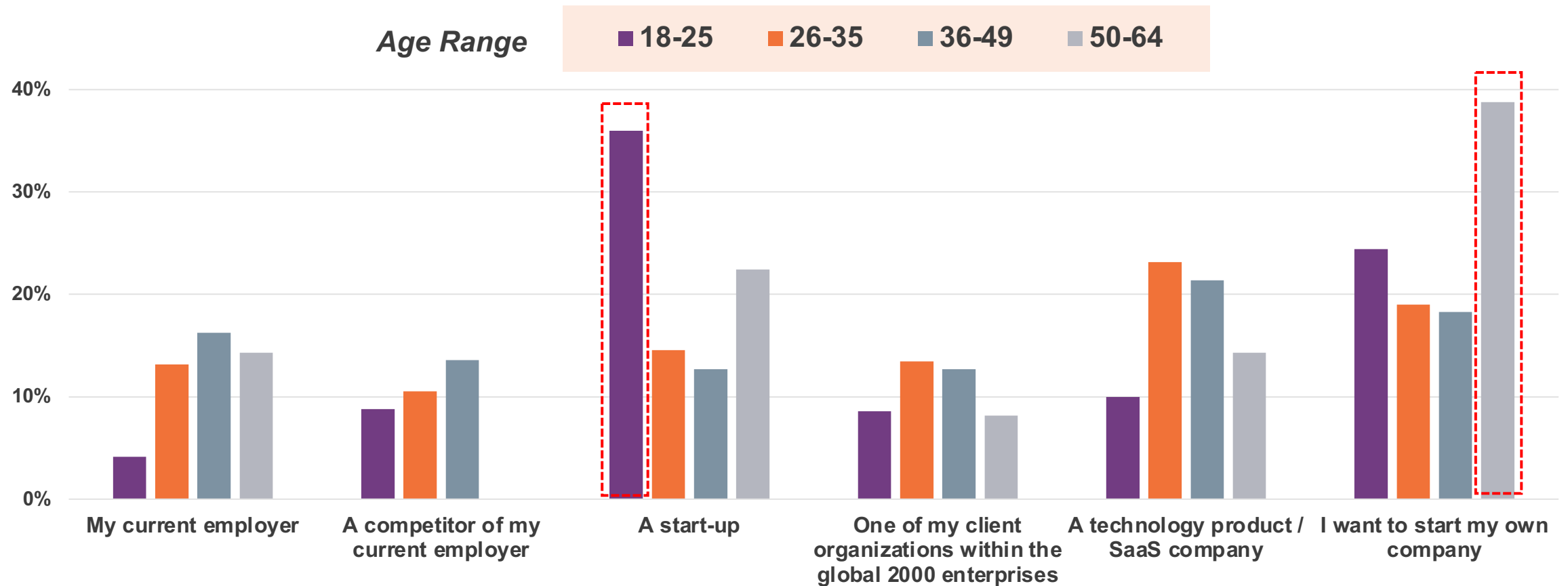
India leads desire to work remotely

- I prefer mainly a work-from-home environment with occasional in-office
- I prefer a fully remote office / work-from-home environment



Gen-Zs want to work for start-ups, Gen-Xers want to start their own businesses

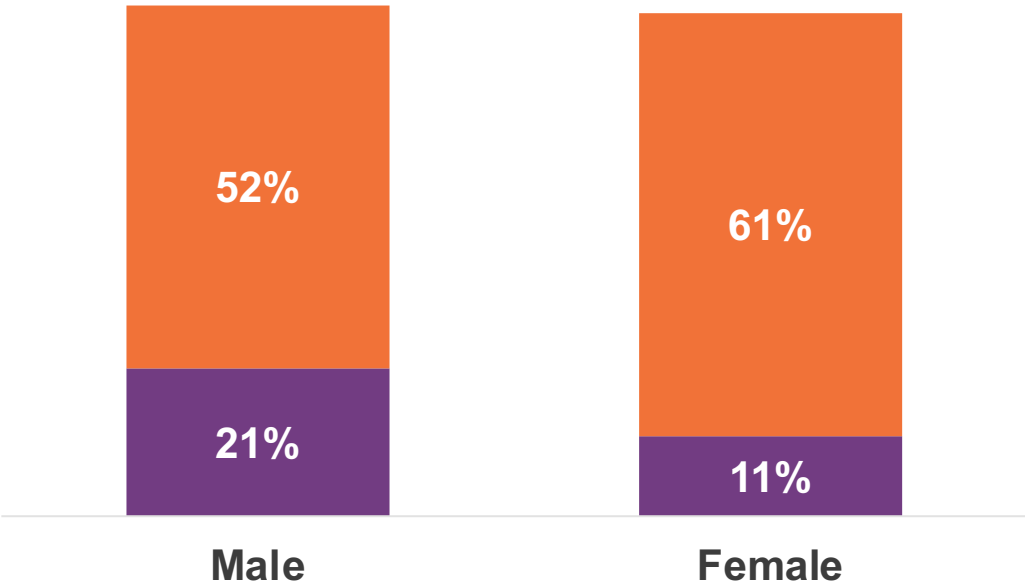
Which of the following best describes your dream employer?



Men even more determined to remain in a remote environment than women!

Extent of Remote Work

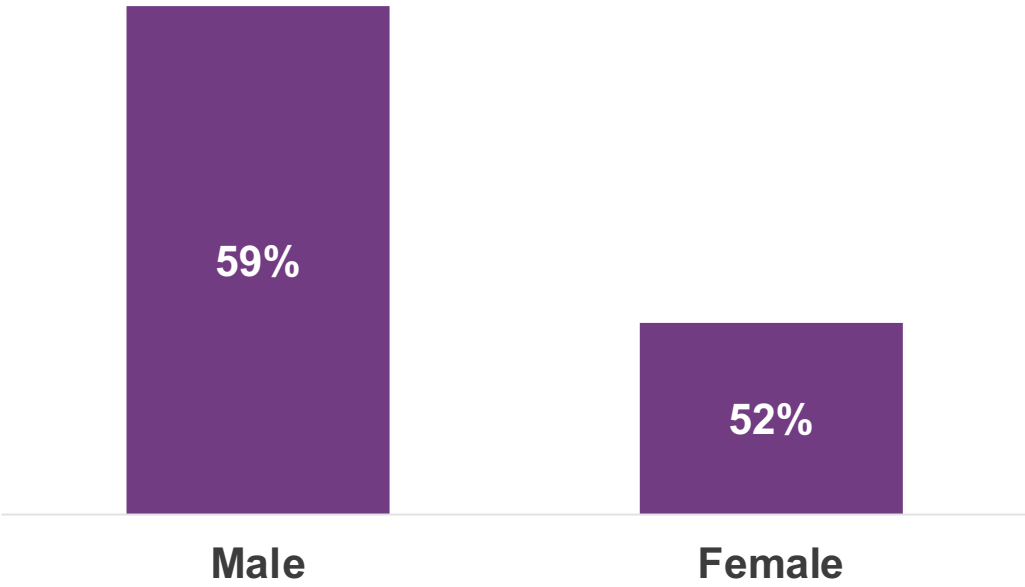
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Preparedness to leave with in-office mandate

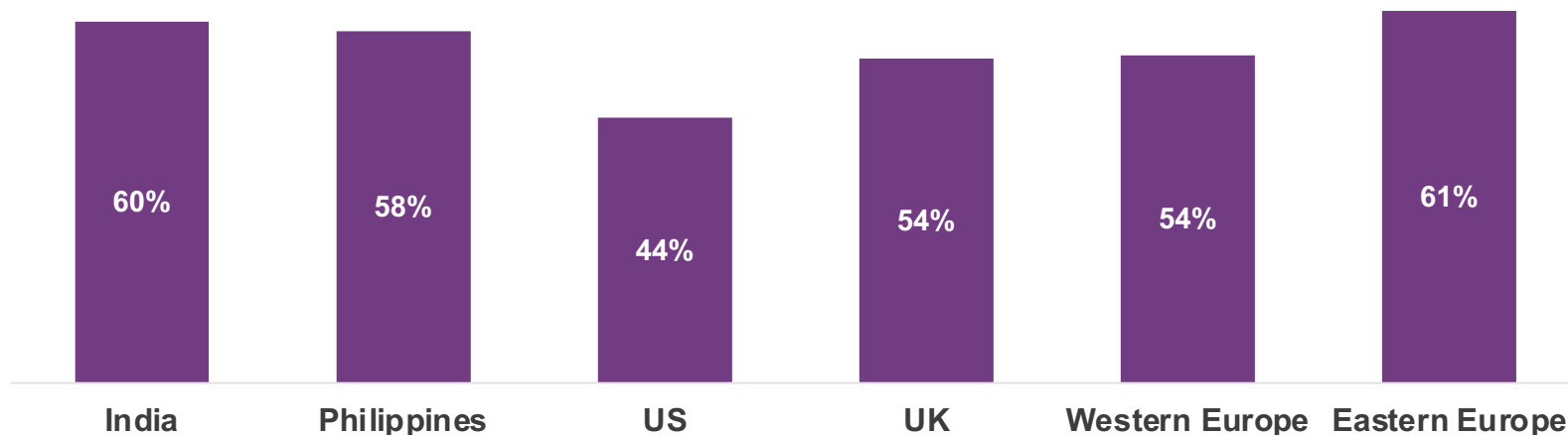
- Would you consider leaving your current employer if they mandated 3 (or more) days per week in-office?

Answer = Yes



Mandating an in-office return puts half the workforce at risk

Would you consider leaving your current employer if they mandated 3 (or more) days per week in-office?

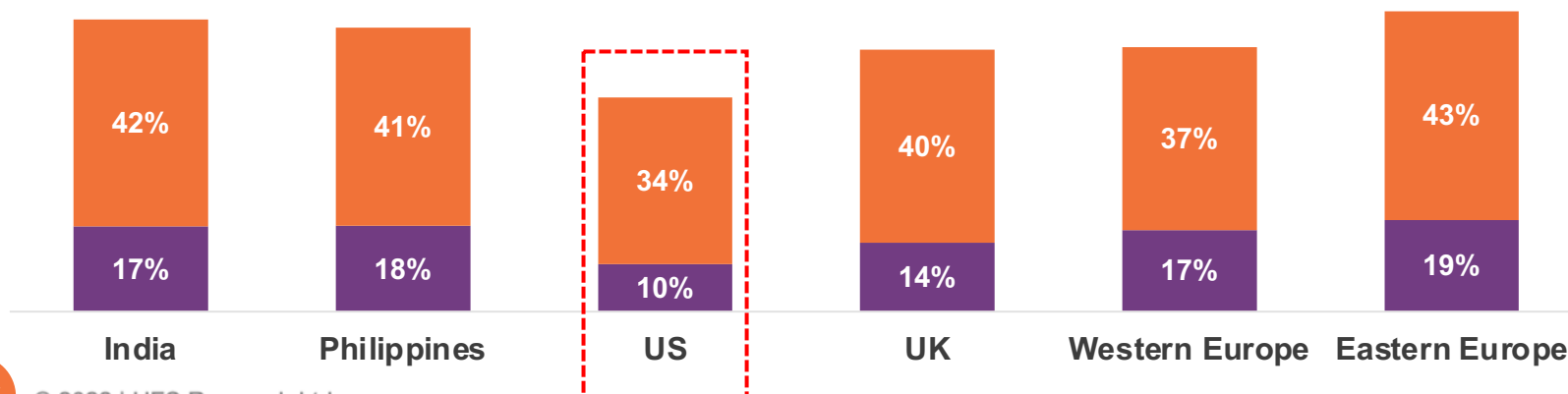


Source: HFS Services Talent Study, September 2022

Sample: 1800 Services employees across the US, UK, India, Philippines, Western and Eastern Europe

However, only 1 in 6 staff are an immediate risk of jumping ship with an in-office mandate

How soon you consider leaving your current employer if they mandated 3 (or more) days per week in-office?

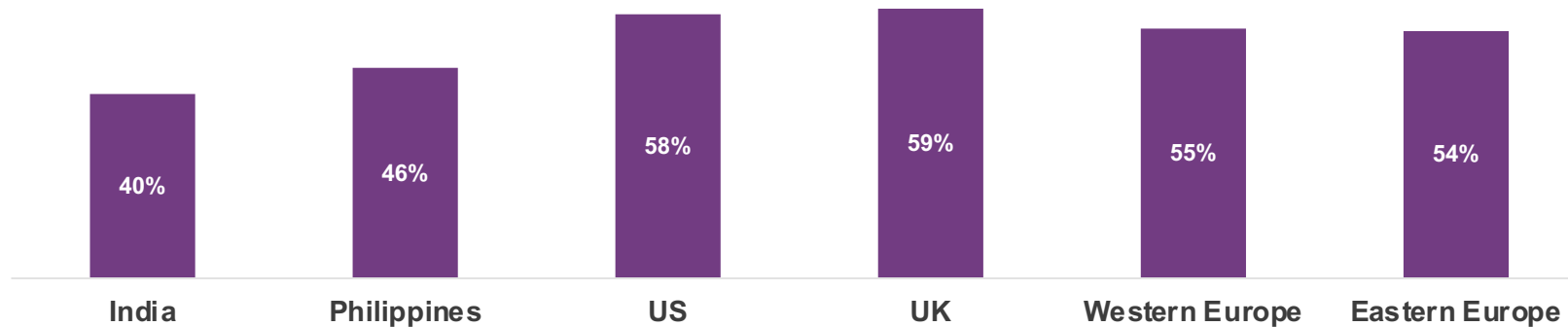


■ I would take my time and evaluate options

■ I would start making plans as soon as possible

Staff bracing for a recession, especially in US and Europe

■ The current threat of an impending economic recession is impacting my thinking about staying / leaving my current job

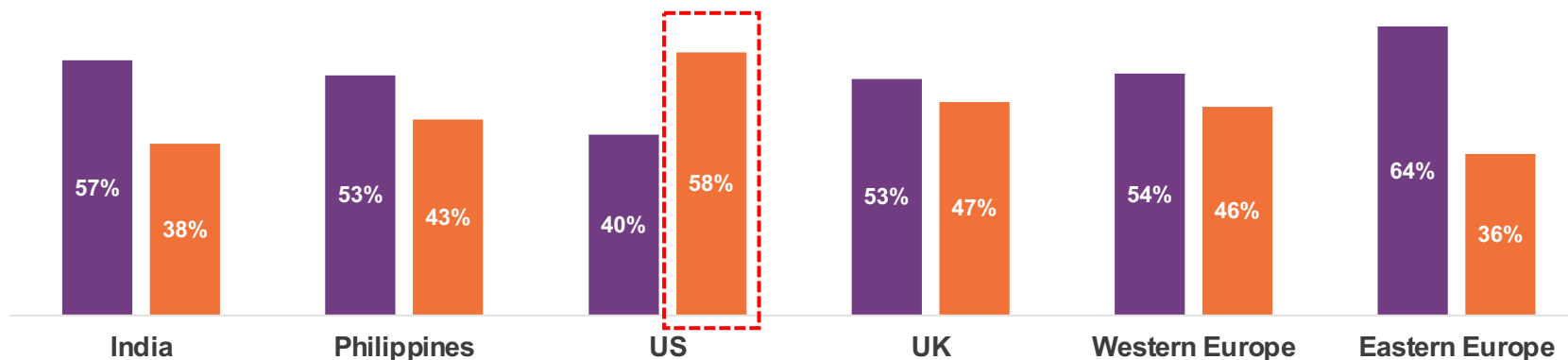


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Sample: 1800 Services employees across the US, UK, India, Philippines, Western and Eastern Europe

US staff more inclined to jump ship in a recession

■ I am more inclined to stay in my current job ■ I am more inclined to leave my current job





*“We’re the biggest **start-up** on the planet... we all meet for three hours once a week, and we all talk about everything we’re doing – **the whole business**. There’s tremendous **teamwork** at the top of the company, which filters down to tremendous teamwork **throughout the company**. And teamwork is about **trusting** the other folks to come through with their part without watching them all the time.’*

“You have to be run by ideas, not hierarchy.”

-- Steve Jobs

Ambitious enterprise rethinking hierarchies and leadership roles

Chief Executive Officer

Long-term infinite mindset
Strategy to drive profit with a purpose
Forcing the change that is needed
Balancing the desires of the stakeholder mix
Collaborative innovative culture
ESG mandate

Chief Partner Experience Officer

Supply chain partners
Industry partners
Cross-industry partners
Technology & Business Service Partners
Hyperscaler Partners

Chief Transformation Officer

IT and Business Operations
End-to-end process ownership
Data & decisions
Cybersecurity
Enabling technologies
(automation, AI, blockchain, 5G, and others)

Chief Customer Experience Officer

Anticipate customer needs
CX Design and Delivery
Digital + Physical engagement
Mindshare growth (marketing)
Wallet-share growth (sales)

Chief Employee Experience Officer

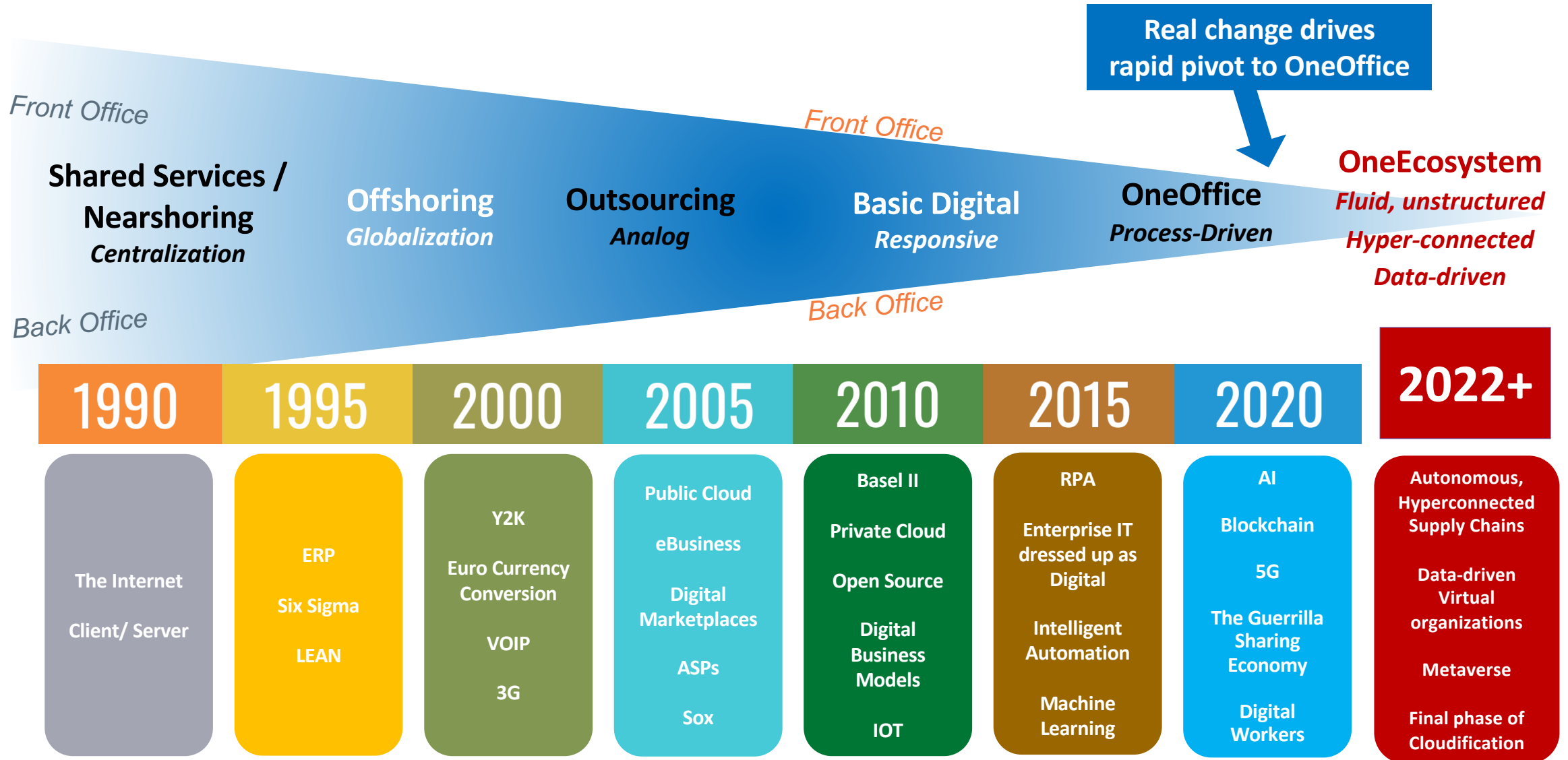
OneOffice skills
Digitally Fluent Workforce
Drive organizational values
Organizational change management
Alternative talent models
Internal stakeholder alignment

3

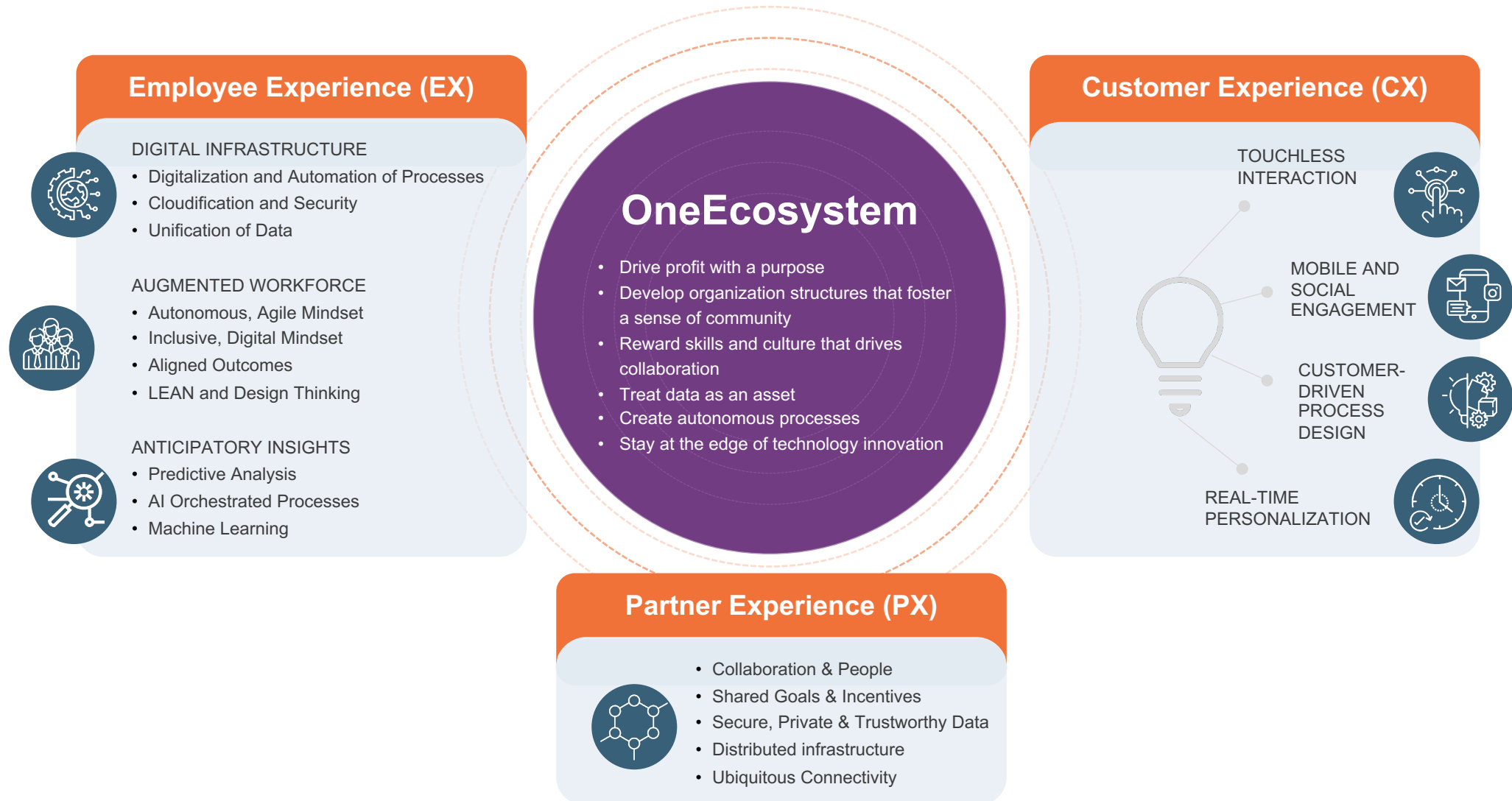
How Services must evolve from Effort to Performance to Purpose to win



Evolution to the OneOffice Mindset and OneEcosystem



HFS OneEcosystem: The Evolution of OneOffice™



The HFS Enterprise Innovation Framework

VALUE ASPIRATION

LINEAR

Horizon 1: Digital

Digitally optimized processes to drive superior business outcomes

- Efficiency and effectiveness mindset
- Unified data reporting
- Domain expertise
- Process workflow

- Cloudification
- Cybersecurity
- Automation
- Machine learning
- Predictive analytics

FUNCTIONAL

EXPERIENTIAL

Horizon 2: OneOffice

End-to-end organizational alignment across front, middle, and back to drive unmatched stakeholder experience

- Growth mindset
- Internal collaboration
- Data-led decision making
- Digitally fluent talent
- Human + machine processes

- Cloud native
- Edge computing
- Artificial intelligence
- Prescriptive analytics
- Internet of things

ENTERPRISE

EXPONENTIAL

Horizon 3: OneEcosystem™

Collaboration across multiple organizations with common objectives around driving completely new sources of value

- Infinite mindset
- External collaboration
- Data-monetization
- Creative talent
- Autonomous processes
- Physical – digital convergence

- Industry cloud
- Blockchain
- Web3 & Metaverse
- 5G
- Quantum computing

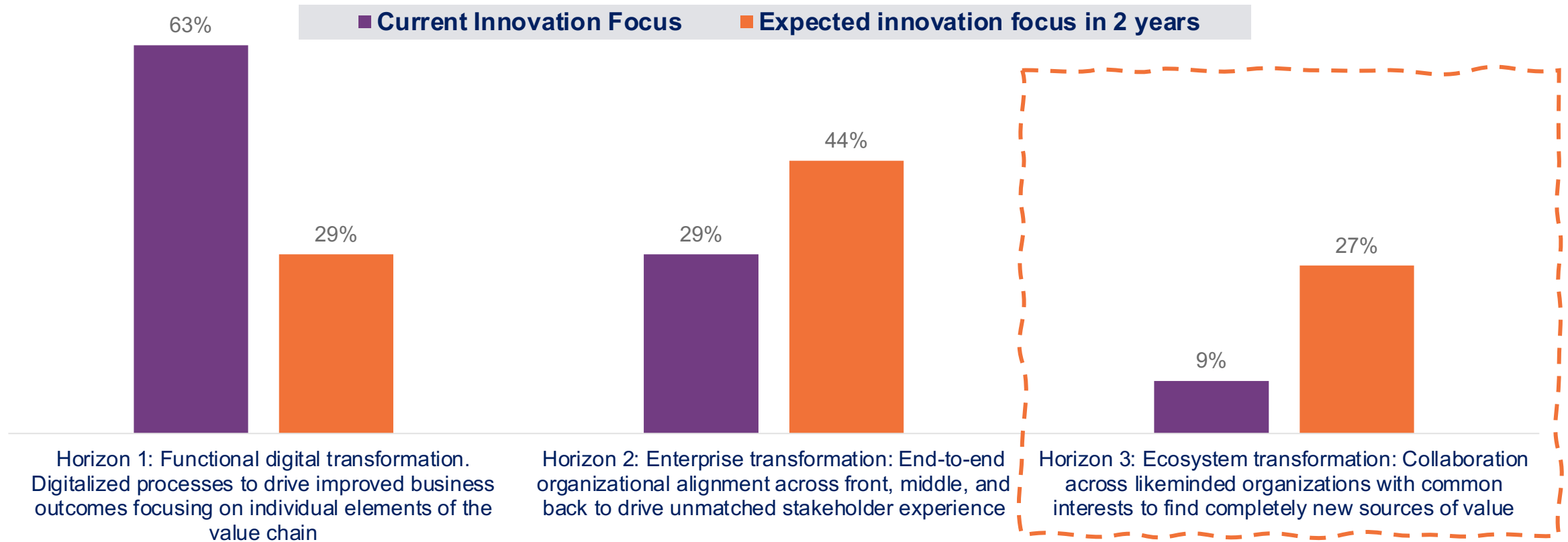
NETWORK

- Organization characteristics
- Emerging tech. adopted at scale

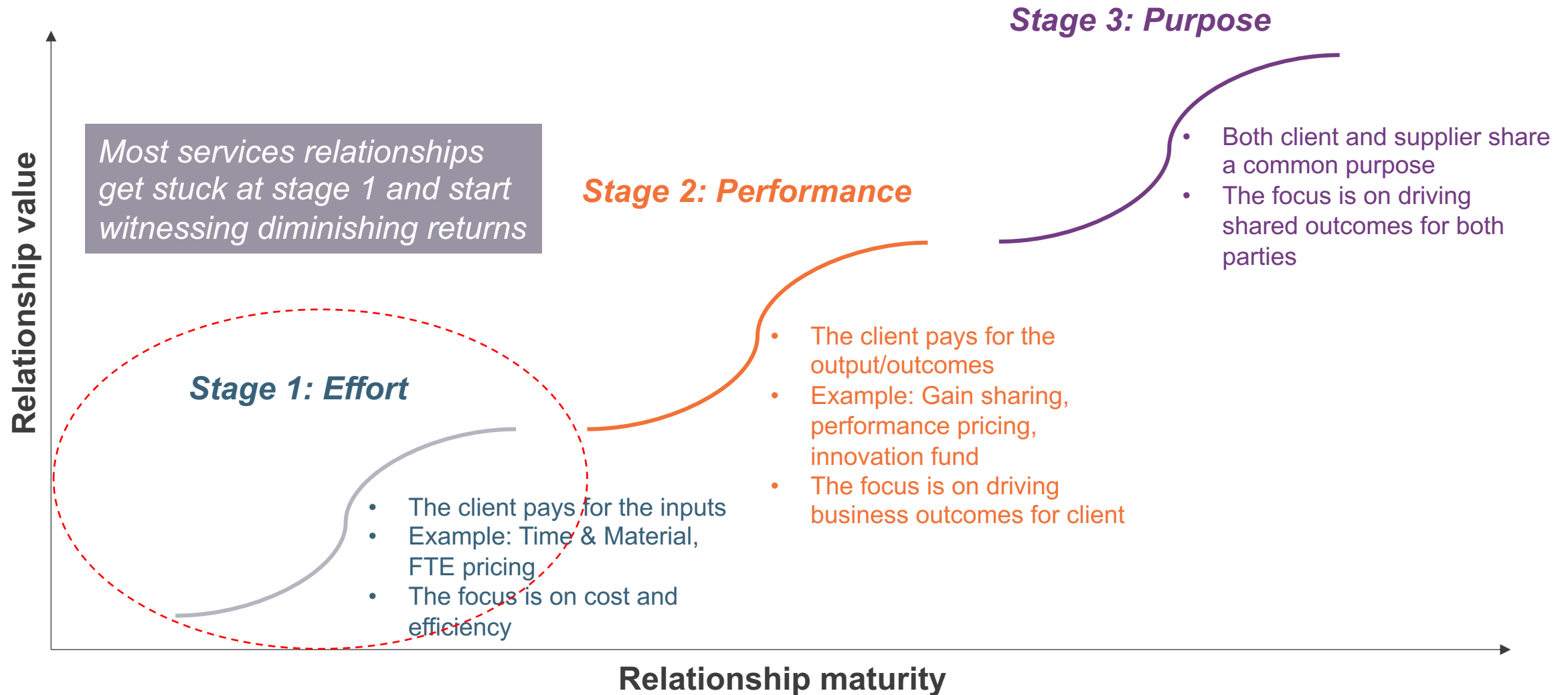
INNOVATION SCOPE

Digital is now Horizon 1 – it is essential for survival. We are hurtling towards Horizon 3 to find new sources of value

What is your organization's current expected innovation focus?



Effort, Performance, Purpose: The Three Evolutions of Services





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*“Without owning something over an extended period of time, like a few years, where one has a chance to **take responsibility** for one’s recommendations, where one has to see one’s recommendations through all **action stages**, accumulate scar tissue for **one’s mistakes** and pick oneself off the ground and dust oneself off, one only learns and a **fraction** of what one can. Not owning the results, not owning the implementation, is a fraction of the **value** and a fraction of the **opportunity** to learn and get better”*

-- Steve Jobs

About HFS

Insight. Inspiration. Impact.

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as "RPA" (Robotic Process Automation) in 2012 and more recently, the HFS OneOffice™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation, Artificial Intelligence, Blockchain, Internet of Things, Digital Business Models and Smart Analytics.

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