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Insights

New fundamentals for a boundaryless world

2023 GLOBAL HUMAN CAPITAL TRENDS REPORT

Contents

Prologue

N 2020, WE wrote a prologue to our 10th annual Deloitte Global Human Capital Trends report, reflecting on the prior decade that had been characterized by "newness" and exponential change. We released that study in May 2020, at the height of a global pandemic that would mark the beginning of a new set of disruptions entering the world of work.

Today, as we enter 2023, the initial crisis response of the global pandemic has faded, but change has continued to enter the workplace at a blistering pace. Perceptions that economic growth is slowing, fears of an impending recession, and rising costs of living are putting increased pressure on organizations and business leaders to do more with less. At the same time, global talent trends—including a hot labor market, a rise in stakeholder

capitalism, and shifts in the composition of the workforce—call into question the very foundation of how, where, and why we work.

> Read more about how seven business and societal shifts are altering the trajectory of organizations' human agendas in *The journey to 2030*.

As we look forward to the decade ahead, lessons from the past few years are still top of mind, including how business realities can change in an instant. Without an option to return to the past or go back to business as usual, organizations and workers must traverse this new landscape together, calling on a new set of fundamentals to navigate the boundaryless world.

Introduction
New fundamentals for a boundaryless world

FOR THE PAST century, we have been governed by a mechanistic view of work. We have assumed that work is fixed and repeatable, readily organized into discrete tasks, and grouped into well-defined jobs. Transformation efforts focused on cost and productivity—how to deliver the same outcomes through faster, more efficient methods. But in recent years, those models have been challenged as organizations and workers grapple with a greater degree of discontinuity and disruption than ever before.

"At the beginning of the COVID-19 pandemic, everybody thought it would be over in six months if we could just hang in there. But what became very true, very quickly, was that this is not a short haul, it's a long haul—and that we were going to have to fundamentally rethink what work means, where work is done, and how we lead work in a different environment."

— Terry Shaw, President and CEO, AdventHealth

The boundaries that were once assumed to be the natural order of things—that work can be organized into clearly defined processes; jobs can be categorized and contained wholly within the organization; work occurs within the four walls of the workplace; and organizations can center their decision-making around shareholders and the bottom line—are falling away. The implication for organizations is that they are traversing a new landscape as they lose those traditional boundaries that kept things packaged and orderly, and gain permission to experiment, pilot, and innovate to define new fundamentals. Similarly, for workers, the rules of engagement with organizations are shifting, opening doors for greater and more meaningful collaboration and cocreation with the organization.

> "Many of the boundaries that used to provide the structure of work have been dismantled. Now the boundaries that remain are much more focused on human dynamics, and how people interact with and engage with work."
>
> — Chris Ernst, Chief Learning Officer, Workday

Human instinct is to feel overwhelmed or hesitant as boundaries fall away; 10,000 respondents in this year's Deloitte Global Human Capital Trends survey said their greatest barrier to achieving organizational outcomes is being overwhelmed by too many changes at once. However, the dissolution of boundaries creates new opportunities for organizations and workers who are prepared to show up in fundamentally different ways. This means no longer simply reacting to stimulus in the marketplace by deploying new strategies against the categories and boundaries of the past. Instead, organizations and workers should challenge prior assumptions and adopt a new set of fundamentals built for a dynamic, boundaryless world rather than the stable, compartmentalized one we are leaving behind.

These new fundamentals require organizations and workers to frame the challenge differently, *thinking like a researcher* in how they approach their business and workforce strategies, treating every new roadblock as an exciting experiment from which they can learn, adapt, and improve. They call on organizations and workers to chart a different path, *cocreating their relationship* in pursuit of new and evolving purpose, innovation, and reimagination. And they require organizations and workers to design for impact, *prioritizing human outcomes* and approaching strategies from a human lens—for humans and by humans.

Framing the challenge: Think like a researcher

To lead in this boundaryless world, organizations and workers should activate their curiosity, looking at each decision as an experiment that will expedite impact and generate new insights. Differentiation and winning will come not from always believing you must have the right answer at the start, but by being able to challenge orthodoxies, operate with humility and empathy, and learn from new information so you can refine as quickly as possible. Our 2023 Global Human Capital Trends survey data shows that 59% of respondents expect to focus on reimagination in the next 2–4 years, which represents a 2x increase from prepandemic levels (as reported in our 2021 report)[1].

> "We gave our teams permission to try new things, fail fast, learn from it, and move on. We have a number of new ventures and strategies as a result."
>
> — Olesea Azevedo, Chief People Officer, AdventHealth

Three of the trends in this report exemplify the need for organizations and workers to *think like a researcher*.

- **Navigating the end of jobs.** The boundaries that delineated job from job, grouping tasks and categorizing workers into narrow roles and responsibilities, are now limiting organizational outcomes, such as innovation and agility. Many are experimenting with using skills, not jobs, as the baseline for how workforce decisions are made. When unboxed from jobs, workers have the opportunity to better utilize their capabilities, experiences, and interests in ways that advance organizational and worker outcomes.

- **Powering human impact with technology.** The boundary between humans and technology as separate forces continues to disappear as new technologies are entering the workplace that not only automate and augment the work done by humans, but actually enhance human and team performance. Forward-leaning organizations are exploring how to use technology in ways that encourage humans both to be their best selves and to do better work.

- **Activating the future of workplace.** Digital and virtual technology advances and the emerging role of the metaverse are redefining the concept of the workplace as a physical space. Now, greater interconnectedness and the blurring boundary between home and on-site work give organizations a unique opportunity to experiment with not "where," but "how" work should be done. Location and modality become secondary to the needs of the work and the workers.

Charting a new path: Cocreate the relationship

To be successful, organizations and workers will need to learn to navigate this new world together, cocreating new rules, new boundaries, and a new relationship. That means ownership models and value must shift. Organizations should abandon former illusions of complete control and recognize the role they play in living, evolving ecosystems, as workers assume greater influence and accountability for organizational and societal outcomes, leading hand-in-hand with the organization.

> "We are shifting our HR function. Now, we're asking ourselves: How do we cocreate? We want to bring users and workers into our decision-making—putting humans at the center of our design."
>
> — Global HR leader, financial services organization

In the Deloitte 2023 Global Human Capital Trends survey, organizations with higher worker involvement in designing and implementing organizational change were more likely to experience positive outcomes. Specifically, those that said they cocreate with their workers stated they were 1.8x more likely to have a highly engaged workforce, 2x more likely to be innovative, and 1.6x more likely than their peers to anticipate and respond to change effectively.

Three chapters of this report exemplify where organizations and workers must *cocreate their relationship*.

- **Negotiating worker data.** The boundary between the organization and the worker's ownership rights—the binary categories of worker-owned data or organization-owned data—is becoming irrelevant. And beyond ownership alone, conversations about what is workforce data, the transparency of that data, and the mutual benefits of data-driven insights are on the rise as data is becoming a new "currency."

- **Harnessing worker agency**. Traditional work, workforce, and workplace models that assume organizations have sole decision-making authority are fading as workers demand more meaningful work, flexible workplace models, and more personalized career paths.

Whereas worker agency might have previously been seen as a threat, leading organizations are finding ways to leverage worker motivation and cocreation to drive mutual and elevated benefits.

- **Unlocking the workforce ecosystem**. The value of fostering diverse workforce ecosystems is enormous, but many organizations are still stuck in old patterns of talent access and management because they're not giving workers of all types (gig, freelancers, contractors, employees, etc.) any say in where, how, and for whom they work. Organizations that adapt their strategies and practices to fit the real-world talent pool, which is far more complex and increasingly comprised of nontraditional workers, will gain access to skills and experiences to accelerate growth, innovation, and agility.

These new ownership models require a large shift from how many work today, so it's no surprise that organizations were least ready to address trends that require cocreation with workers. According to our survey, only 19% of organizations said they're very ready for data ownership, 17% for worker agency, and 16% for workforce ecosystems. This readiness gap will be critical to overcome for organizations to capitalize on the innovation and improved individual, business, and societal results these trends could drive.

Designing for impact: Prioritize human outcomes

The final fundamental for a boundaryless world relies on collective aspirations. Organizations should create impact not only for their business, their workers, or their shareholders, but for the broader society as well. Over half of organizations surveyed this year aspire to create greater connections with the society they work in, indicating that the social enterprise, as we defined in the *Deloitte 2018 Global Human Capital Trends report*, continues to be a pivotal force in the world of work.

It's no longer enough to build discrete programs that will create value around the edges of important topics like climate, equality, or human risk; they are fundamental to an organization's ability to thrive in this new world of work. In the Deloitte 2023 Global Human Capital Trends survey, more than 80% of organizations reported purpose; diversity, equity, and inclusion (DEI); sustainability; and trust as top focus areas.

Three chapters of this report exemplify how organizations and workers are *prioritizing human outcomes.*

- **Taking bold action for equitable outcomes.** The idea of diversity as a metric is dissolving in place of the notion that organizations need to be looking at DEI as outcomes instead. Those outcomes will focus on equity in how organizations access talent; enable talent through development programs, methods, and tools; and how they advance and promote talent at all levels of the organization. Organizations will be held accountable less for their activities and efforts and more for their ability to achieve equitable outcomes in support of larger societal goals.

- **Advancing the human element of sustainability.** The boundary of the organization as a fully autonomous entity, with interests that can be separated from the interests of society at large, is blurring. As such, organizations are facing mounting pressure to address sustainability issues from governments, global coalitions, their communities, and, not least, their current and future workforce. That workforce is demanding that organizations move past rhetoric about sustainability in favor of delivering observable outcomes. As a result, organizations must focus on the human elements, which have been largely absent in their strategies and actions to date, by "hardwiring" sustainability into the workforce and work itself.

- **Elevating the focus on human risk.** Organizations have traditionally thought of human risks through a narrow lens—the potential risks that workers pose to the business. In the new world, organizations should expand their view of human risk beyond compliance and reporting to consider how a broad set of risks are significantly affecting and are significantly being affected by humans. These risks, which can have a material effect on a company's long-term viability, must be fully understood by all executives, with ultimate accountability sitting with the board.

Leading in a boundaryless world

For those who get it right, the boundaryless world becomes one of infinite possibility instead of chaos and confusion. As old boundaries shift and disappear, organizations and workers can deploy these fundamentals to set new guidelines, create more autonomy, imagine new possibilities, and

achieve mutual value for the organization, the workforce, and society. But doing so requires them to employ new mindsets, letting go of the work, workforce, and workplace operating models of the past to embrace a more fluid and more human future, focused on speed, agility, experimentation, and innovation.

> "An alternative definition of the word boundary is frontier. A frontier represents the location of the newest, most innovative, most value-creating opportunity in an entity or an organization. The fundamental challenge, and opportunity, is to reframe how we think of boundaries as not just things that create limits or restraints, but as the very source for new value creation, innovation, and creativity."
>
> — Chris Ernst, Chief Learning Officer, Workday

New leadership capability is needed at all levels of the organization to mobilize workers and teams for achieving new outcomes. Yet only 23% of organizations in the Deloitte 2023 Global Human Capital Trends survey say their leaders have the capabilities to navigate a disrupted world. They point to concerns about leaders' ability to manage the evolving workforce, with less than 15% of organizations saying their leaders are very ready to inclusively lead an expanding workforce or to

consider broader societal and environmental risks when making workforce decisions. They also express concerns about the design and execution of work itself: Only 16% say their leaders are very ready to use technology to improve work outcomes and team performance, and only 18% say their leaders are very ready to develop the right workplace model for their organization.

A new brand of leadership will be required—one that focuses on where you show up and how you show up, and the mindset you adopt to drive work forward. More specifically, you will need to:

- Use experimentation to inform better solutions, foster learning, and accelerate value.

- Cultivate deep and intimate relationships with the workers across your broader ecosystem through cocreation.

- Widen the aperture of your decision-making to understand its full impact with the human agenda in mind.

Those who partner with their workforce and experiment with what's possible will be able to create sustainable models of work, making work better for humans and humans better at work.™

Endnotes

1. Jeff Schwartz et al., *Deloitte 2021 Global Human Capital Trends—Introduction: The social enterprise in a world disrupted*, Deloitte Insights, December 9, 2020.

Acknowledgments

The authors would like to thank **Olesea Azevedo** (AdventHealth)**, Terry Shaw** (AdventHealth), and **Chris Ernst** (Workday) for their contributions to this chapter.

Navigating the end of jobs

Skills replace jobs as the focal point for matching workers with work

Coauthored by Karen Weisz.

Since the dawn of the industrial age, the job has been the defining structure for organizing and managing every aspect of work. That approach made sense when business changes occurred slowly, and workers were just pieces in the industrial machine. The solution? A skills-based approach to managing work and workers, delivering business agility and worker autonomy by enabling work to be performed beyond formal job boundaries.

THE CONCEPT OF the *job*—a predefined set of functional responsibilities assigned to a particular worker—is so ingrained in how organizations operate that it's hard to imagine any other way of managing work and workers. Yet many recognize this traditional construct is failing to serve our boundaryless world. Our skills-based organization survey revealed that only 19% of business executives and 23% of workers say work is best structured through jobs. As a result, a growing number of organizations are beginning to imagine work outside of the job—turning workforce management on its head by increasingly

basing work and workforce decisions on skills—not formal job definitions, titles, or degrees.

This shift is being driven by several related factors:

Performance pressure. Thirty percent of our skills-based organization survey[1] respondents report their organizations are ineffective at matching the right talent to work. A skills-based approach boosts productivity, efficiency, and effectiveness by better aligning workers with work that fits their skills and capabilities, including technical skills, soft or human skills, and potential

future skills in adjacent areas. Organizations that do this effectively can unleash worker potential to drive greater value and are 52% more likely to be innovative.[2]

Need for agility. Sixty-three percent of business executives report workers are focused on team and project work that falls outside their current job descriptions. Further, 81% of executives say work is increasingly performed across functional boundaries. A skills-based approach improves organizational agility by enabling workers to be quickly deployed—or redeployed—based solely on their skills and the work that needs to be done, irrespective of their job title or functional area. Organizations with a skills-based approach are 57% more likely to be agile.[3]

Talent shortages. Focusing on skills helps alleviate talent shortages by providing a more expansive view of the work people are able to do, instead of artificially limiting the talent pool to people with specific backgrounds and job histories. This also allows organizations to mitigate talent shortages by plugging gaps with internal resources instead of hiring from outside. Organizations with a skills-based approach are 107% more likely to place talent effectively and 98% more likely to retain high performers and have a reputation as a great place to grow and develop.[4]

Increased focus on equitable outcomes. A skills-based approach also helps promote diversity and equity in the workplace. In the skills-based organization survey, 75% of executives say hiring, promoting, and deploying people based on skills (versus tenure, job history, or network) can help democratize and improve access to opportunities. Merck and IBM, for example, are part of a coalition called OneTen that is committed to hiring, upskilling, reskilling, and promoting one million Black people without four-year degrees by shifting to a skills-first approach.[5]
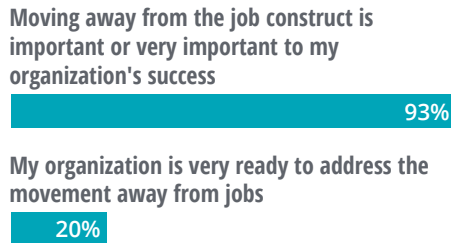
The readiness gap

In the Deloitte 2023 Global Human Capital Trends survey, 93% of our respondents said moving away from a focus on jobs is important or very important

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SIGNALS: THIS TREND APPLIES TO YOU IF …

- Your organization spends too much time adjusting job descriptions to accommodate changing work

- You are losing top talent as a result of inadequate development opportunities to grow adjacent skills

- You are having difficulty accessing talent due to overreliance on degrees and previous roles over skills and potential aligned with emerging business priorities

- Promising, diverse candidates are being screened out of talent pipelines due to their supposedly inadequate job history

- Workers are struggling to find new opportunities outside of their siloed business units

FIGURE 1

The readiness gap for a skills-based approach

Moving away from the job construct is important or very important to my organization's success

93%

My organization is very ready to address the movement away from jobs

20%

Source: Deloitte 2023 Global Human Capital Trends survey.

to their organization's success. Yet only 20% believe their organization is very ready to tackle the challenge, representing the largest readiness gap of all trends surveyed (figure 1).

What's holding organizations back? According to the skills-based organization survey, the top challenge/obstacle is *legacy mindsets and practices*, cited by 46% of business and HR executives as one of the top three obstacles to transforming into a skills-based organization. Technology is not the issue; only 18% cite lack of effective skills-related technology as a top three obstacle, the lowest of the 10 obstacles listed.[6]

The new fundamentals

Define work based on the skills required. Instead of defining work as a specific set of tasks and responsibilities (i.e., a job), define work primarily based on the skills it requires. Organizations will need to first consider their strategic objectives or desired outcomes, then identify the work that needs to be done to achieve them and the skills required to do that work.

Collect and analyze data about worker skills. Thanks to recent technology advances in skills assessments, skills inferencing, analytics powered by artificial intelligence (AI), and live "tryouts" for evaluating external candidates, organizations have

access to a differentiated level of work skill data. Similar technology can be used to inventory the skills of existing workers, supplemented with more holistic data about workers' interests, values, work preferences, and more.

Collecting data about workers can be controversial, as discussed in our "Negotiating worker data" chapter. However, in the context of skills, our research suggests workers are more open to having this data collected. Eight in 10 workers are willing to have their organization collect data about their *demonstrated* skills and capabilities and seven in 10 are willing to have data collected about their *potential* abilities. This even extends to using AI to passively mine worker data as they work, with 53% of workers seeing this as positive.[7]

View workers based on their skills, not job titles. Instead of viewing workers narrowly as job holders performing predefined tasks, view them holistically as unique individuals with a portfolio of skills to offer—and then match them with work that aligns with those skills. The work might be performed by an individual, a team, or a shifting set of resources, each person contributing their appropriate skills (while improving their current skills and developing new ones), then moving on to other work when their particular skills are no longer needed. As part of the deployment process, it's ideal to match workers with work that aligns not only with their skills, but also with their unique interests, values, passions, development goals, location preferences, and more—since people are happiest and most productive when doing work that fits who they are and what they care about. Doing so will help workers maximize their personal contributions and growth. It will also help create a more equitable and human-centric worker experience, creating value for workers and society at large.

Make decisions about workers based on skills. Beyond matching workers to work based on skills, organizations will want to make skills the

focal point for all workforce practices throughout the talent life cycle—from hiring to careers to performance management to rewards—placing more emphasis on skills and less on jobs. For example, in hiring, that means evaluating candidates based on skills and capabilities rather than degrees and certifications. More than one in three respondents to the Deloitte 2023 Global Human Capital Trends survey state that they are not using skills to help their workforce meet their fullest potential, highlighting an opportunity to embed skills throughout the talent life cycle.

> "Skills can be a very objective, quantifiable measure of capability and proficiency. We're able to use skills data as an input into workforce planning decisions, where we take a lot of different data sets, and we align that to business strategy. With Cisco being a large, complex global organization, this strategy will allow us to be nimble and very intentional about our workforce planning decisions."
>
> — Kate Driscoll, Workforce Strategy and Organizational Design leader, Cisco[8]

Current experiments: What leading organizations are exploring

- **The US Army Civilian workforce** is implementing a career-pathing capability for its contracting and logistics professionals, moving toward a skills-based organization with increased flexibility to meet changing mission needs and workforce agency to enable employees to better own their career and stay longer within the Army. The career-pathing approach allows Army leadership to visualize the skills and preferences, not just positions, of its current talent, shows fit alignment to future-state roles, and leverages talent data to support a more resilient and sustainable future workforce.[9]

- **A financial services organization** developed a virtual career assistant that uses AI to mine employees' skills and interests to determine their most suitable jobs—and where training could help them pursue new opportunities.

- **Morning Star**, the tomato-processing company, has only two management layers: the president, who makes strategic decisions, and everyone else. Instead of job titles, workers create their own list of outcomes and problems to be solved, with authority and pay based on skills, expertise, and value created—rather than position.[10] For example, one worker's personal mission is to turn tomatoes into juice in a way that's highly efficient and environmentally responsible.

The path forward

FIGURE 2

Survive. Thrive. Drive.

Survive	Thrive	Drive
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Deconstruct work to its lowest level and define work outcomes to align with business priorities • Inventory current skills in critical workforce segments • Create a work architecture by mapping work to skills to jobs • Pay for hot skills versus priority jobs • Link skills to learning to unlock workforce potential • Increase access to talent through screening criteria that emphasize skills over job history	• Expand skills inventory with a greater focus on future skill needs • Define broad work clusters based on outcomes or challenges to be solved • Establish an internal talent marketplace to match workers to work and learning • Refocus leaders on managing to outcomes, not job-based tasks	• Extend the talent marketplace to include your entire workforce ecosystem (internal and external workers) • Involve workers in cocreating their own customized work experiences • Use skill adjacencies and AI for emerging work, reskilling opportunities, and career progression • Set compensation based on a worker's skills and outcomes achieved • Transform talent management so that all practices are skills-based

Source: Deloitte analysis.

Looking ahead

A skills-based approach is not an invitation to exert more control over what people do by using algorithms to assign people to ever-smaller pieces of work based on ever-narrower definitions of skills. Talent marketplaces today, in contrast, use AI to suggest new opportunities to people (e.g, projects, tasks, mentors, learning experiences, and more), granting workers autonomy and choice in what they decide to pursue.

To thrive, organizations should trust workers to deliver outcomes based on their skills, interests, and potential, not just their past credentials and job history. It will also require a willingness to assign work based on adjacent skills, not just current skills. This will give workers opportunities to grow in adjacent areas by building on the skills they already have, which is extremely beneficial both for them and the organization.

Efforts to adopt skills-based thinking range from modest to radical. Some are starting with classifying skills, while others are doing away with the concept of jobs entirely. In a conversation with M&T Bank's Chief Talent Officer Neil Walker-Neveras, he shared, "When the Paycheck Protection Program (PPP) was rolled out during the pandemic, we had to stop thinking about jobs and start thinking about skills. We were the number six Small Business Administration lender in the country—and the number one in much of the Northeast US—so we had a responsibility to help
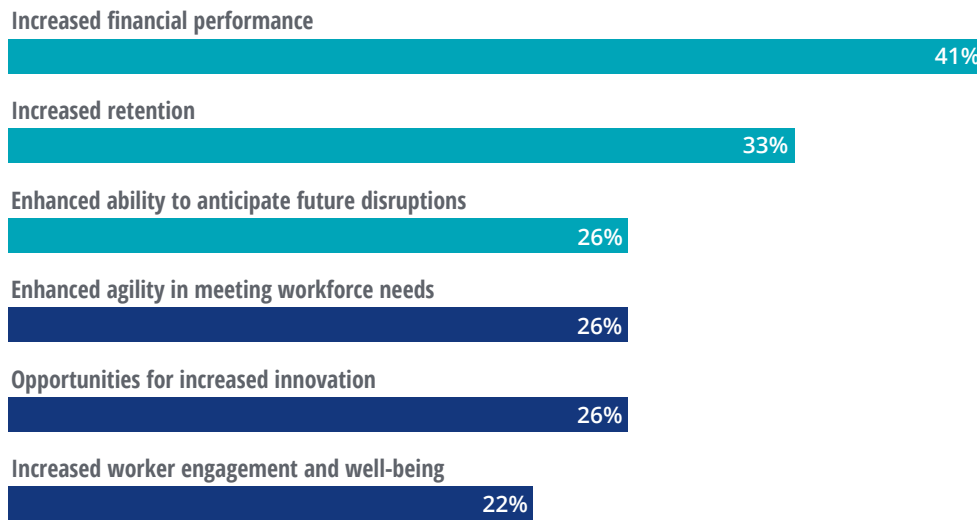
small businesses stay viable. By focusing on skills versus jobs—and rapidly mobilizing talent in an agile way—we outperformed our peers, funding 96% of qualified applicants loans in the first round, and 100% in the second round, versus peers with more advanced technology that struggled to fund more than 50% in the first round."[11]

Regardless of which approach you take on your journey to become a more skills-based organization, one thing is clear: There are significant outcomes to be achieved, both for the organization and for the workforce.

FIGURE 3

Benefits from effectively matching workers to work

■ Benefit to organization ■ Benefit to workforce

Increased financial performance
41%

Increased retention
33%

Enhanced ability to anticipate future disruptions
26%

Enhanced agility in meeting workforce needs
26%

Opportunities for increased innovation
26%

Increased worker engagement and well-being
22%

Source: Deloitte 2023 Global Human Capital Trends survey.

Endnotes

1. Sue Cantrell et al., *The skills-based organization: A new operating model for work and the workforce*, Deloitte Insights, September 8, 2022; the article features data from Deloitte's skills-based organization survey, which polled 1,021 workers and 225 business and HR executives across a range of industries and in 10 countries, namely Australia, Brazil, Canada, Germany, India, Japan, Singapore, South Africa, the United Kingdom, and the United States.

2. Ibid.

3. Ibid.

4. Ibid.

5. PRNewswire, "OneTen launches technology platform to create and enable one million career opportunities for black talent over the next 10 years," June 29, 2021.

6. Cantrell et al., *The skills-based organization*.

7. Ibid.

8. Interview with authors.

9. Based on work done by Deloitte with this client.

10. Gary Hamel, "First, let's fire all the managers," *Harvard Business Review*, December 2011.

11. Interview with authors.

Acknowledgments

Powering human impact with technology

Technology contributes to making work better for humans and humans better at work™

Coauthored by Martin Kamen, Tara Mahoutchian, and Nate Paynter.

New workplace technologies are emerging that don't just augment human workers but actually help them improve their own personal and teaming capabilities—helping humans become better humans and teams become better teams. This is more than just wearables. It's technology supporting humans in countless ways to foster new behaviors and help workers become better versions of themselves.

THE RELATIONSHIP BETWEEN intelligent technology and workers has evolved significantly over time. At first, technology was used as a substitute for workers, automating them out of tasks that were dull, dirty, dangerous, or disconnected. Next, it was used to augment workers, functioning alongside them as a tool that provided additional or enhanced capabilities and insights. We referenced these trends in previous reports as superjobs[1] and superteams[2], which have continued to accelerate thanks to how technologies are advancing. Now, we're seeing technologies emerge that aren't just a substitute or supplement for workers but actually help them improve who they are—enabling humans to become better humans and teams to become better teams.

For example, Gogi Anand from LinkedIn shared, "The whole employee experience is about to be turned upside down by technology, and it's going

to be very beneficial for people. For example, when I do presentations, I get prompts from Speaker Coach within Microsoft Teams, and it tells me how quickly I'm speaking, or if I'm dominating a meeting. It gives me instant feedback that helps me become a better presenter. When I look in my recognition platform, AI nudges me to be more inclusive in my language. This type of technology will be really helpful for both information workers and frontline workers."[3]

Leveraging principles from psychology, anthropology, sociology, and behavioral science, these innovative technologies are reshaping the boundaries of how we define and improve human, team, and organizational performance. Intelligent devices powered by AI, in particular, are providing an ever-growing volume of performance-related information to enhance human impact at work. In fact, some studies estimate that AI and machine learning will contribute to a 37% increase in labor productivity by 2025.[4]

SIGNALS: THIS TREND APPLIES TO YOU IF ...

- Multiple, competing technology solutions are leading to workforce exhaustion, productivity plateaus, and team dysfunction

- Your technologies are focused on and designed for organizational performance, rather than human and team performance

- Your technology investments are measured solely on cost and ROI, rather than human outcomes

The readiness gap

According to the Deloitte 2023 Global Human Capital Trends survey, more than 90% of surveyed business leaders believe that using such technology to improve work outcomes and team performance is very important or important to their organization's success. Yet only 22% believe their organizations are very ready to use technology to improve work outcomes and team performance.

FIGURE 1

The readiness gap for harnessing technology

Using technology to improve work outcomes and team performance is very important or important to my organization's success

93%

My organization is very ready to use technology to improve work outcomes and team performance

22%

Source: Deloitte 2023 Global Human Capital Trends survey.

While many organizations have implemented traditional workplace technologies to drive better work outcomes, many are currently cautious about embracing new intelligent technologies that are more experimental in nature. However, they see the opportunities ahead. Forty-two percent of business leaders expect that over the next 2–4 years, technology will help drive better organizational outcomes by nudging workers and teams to perform better.

The new fundamentals

Enable technology to work on the worker (and the team). The traditional view of technology as a substitute or supplement for human labor is too narrow. Moving forward, you need to harness technologies that help your people

and teams become the best possible versions of themselves. This means nudging them to learn new behaviors, correct old behaviors, and sharpen skills. For example, successful and error-free surgeries in the operating room (OR) require finesse, but determining the exact amount of pressure to apply on the instrument is challenging for surgeons. Technology provides surgeons with smart scalpels and forceps that allow them to gauge and adjust pressure in real time, subsequently improving precision and patient outcomes.[5]

Use interventions and nudges to make humans better. Technology can also aid humans in improving on things that are "fundamentally human." Given the traditional view of technology as a substitute or supplement for humans, it's ironic to think of technology being used to make humans more human. Yet that's exactly what we're talking about here. Technology can help us get better at what we already do best—things like driving well-being, practicing emotional intelligence, and fostering creativity and teaming, which technology itself can't do.

Helping humans become better versions of themselves is a worthwhile endeavor on its own. However, from a business perspective, it has the valuable fringe benefit of making people better at their jobs, thereby boosting engagement and performance. Building on the surgery example from the previous fundamental, technologies are also monitoring care team members' time in the OR and cross-referencing that time with error data for the relevant type of surgery, to deliver alerts about fatigue risk. Not only does this improve outcomes for the patient, it also improves well-being for the surgical team.

Scale insights for greater impact. Beyond the individual and team impact, this technology–human team collaboration can also drive impact through insights at scale. All this technology, whether it's used for nudging, collaboration,

training, or another purpose, creates data "exhaust."[6] This data is a powerful tool all on its own. Following the surgical example, technology aggregates the data about finesse adjustments, time in-surgery, and errors, to draw insights across an entire hospital or health system to inform changes to workforce practices like shift length, scheduling, or equipment investments. This type of information could then be used to elevate performance and outcomes across workers, teams, the organization, and the ecosystem.

This imagined future isn't just possible; in many cases, it's already here. And its potential impact is even greater when applied not just to individuals, but also to teams (and to networks of connected teams pursuing adjacent goals). The result is improved performance, learning and development, communication, and collaboration. Executives who responded to the Deloitte 2023 Global Human Capital Trends survey believe in the benefits of enabling technology and teams to collaborate to drive outcomes, with one in three reporting an increase in financial performance as a result of their approach to technology and team collaboration.

Current experiments: What leading organizations are exploring

- **Humu** analyzes company data and worker feedback to identify changes likely to improve workers' happiness, performance, and retention.[7] The technology is like a virtual personal coach, using AI to mine worker surveys and other data inputs to identify which behavioral changes could help workers and organizations reach their goals. It then sends workers tailored nudges that appear in email, Slack, or Microsoft Teams. The nudges are aimed at changing behaviors, often with explanations or links to research about why the

behaviors matter. As workers (and the people around them) report improvement, machine learning helps the system move on to additional goals.

- **Ultranauts** is using Teams and Slack bots to eliminate barriers that made it challenging for neurodivergent people to find a home in tech companies.[8] The company's CEO empowered employees to create their own personal "biodex"—a quick-start guide to working with them so people with diametrically different styles can immediately understand how to best collaborate.

- **Drishti's** action recognition technology, which is enabled by AI and computer vision, allows DENSO, a Japanese auto component manufacturer, to generate real-time, continuous analytics on manual tasks performed by its production employees.[9] The resulting data set gives production managers the ability to quickly identify and eliminate bottlenecks, improve processes, boost efficiency, and prioritize tasks. Drishti CEO Prasad Akella noted, "We've found that employees at factories are excited to use Drishti because it helps them train continuously without interference from a manager. The system nudges the line associate when a mistake happens, giving him or her the opportunity to fix the problem, unbeknownst to anyone else."

- **Dawn Avatar Robot Café** in Tokyo has robot servers that are operated remotely by people who can't leave their home due to disability, childcare, or other reasons.[10] These remote-controlled robot avatars were designed to make the workplace more accessible, giving the remote café workers more opportunities to interact with others and expanding the pool of potential café workers.

The path forward

FIGURE 2

Survive. Thrive. Drive.

Survive	**Thrive**	**Drive**
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Understand how the technology in place impacts the workforce experience as you automate and augment work • Remove technology barriers for cross-team collaboration • Define measures of success for team performance, inclusive of technology	• Incorporate nudging technology in your digital transformation journey • Prioritize the "moments that matter" for human–technology collaboration, and the investments needed to address them • Understand and address risks of humans and technology working together (e.g., configure technology to mitigate unconscious bias)	• Embed purpose into the enterprise tech strategy by choosing technologies whose functionality and capability help enable the organization's purpose • Enable technology-driven insights on human performance, which contribute to development opportunities and performance recognition decisions • Measure technology investments against their ability to improve worker and team performance and human outcomes (e.g., well-being, engagement)

Source: Deloitte analysis.

Looking ahead

As we move from the information age to the imagination age, technology is evolving from helping workers produce outputs to enabling humans and teams to focus on outcomes, making work better for humans and humans better at work™. These outcomes have downstream effects on customers, product quality, site safety, the environment, and beyond. Realizing this value requires organizations to move away from outdated views of technology as a productivity enhancer and embrace the potential of intelligent technologies to enable human and team impact, powered by technology.

You'll know your organization is making progress if workplace technology is improving teamwork and helping teams stay connected, and if workers are improving their personal capabilities with more time to focus on high-value cognitive tasks such as creativity, ideation, and innovation. These workplace technologies will also play a significant role in enabling other trends in this report, such as worker data, workforce ecosystems, and the future of the workplace.

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Acknowledgments

Activating the future of workplace

The workplace evolves to be an input to the work itself

Coauthored by Martin Kamen, Tara Mahoutchian, and Nate Paynter.

The ideal workplace is not just a physical site dictated by tradition, right, or necessity—but wherever work is best done. Organizations need to challenge traditional boundaries and design physical, digital, or hybrid environments that fit varying work needs, while respecting worker preferences and meta-objectives such as culture, community, and teamwork. Workers can then determine when, where, and how to best accomplish the work within broad guidelines aimed at enabling, not constraining, these decisions.

THE ASSUMPTION OF workplace as simply a physical location has been under pressure for some time now, with virtualization of work trending well before the disruption brought on by the COVID-19 pandemic. However, that dramatic disruption forced organizations to more quickly rethink how to connect and engage workers in virtual and hybrid work environments and to embrace the possibilities of a boundaryless workplace. Unfortunately, it appears old habits are hard to break, as we've seen some pullback due to outdated definitions of what work is and perceptions about worker productivity or organizational culture as many companies push to get workers back into the office.

Moving forward, leaders should focus on the fundamental issue, which is the design and practice of the work itself, as the work will dictate the mix of physical and digital workplace required to meet business outcomes. Unfortunately, only 15% of respondents to the Deloitte 2023 Global Human Capital Trends survey cited the way work is designed as one of the most important attributes in creating the future workplace.

The shift toward a boundaryless workplace is driven by two main factors: worker agency and technological advancement. Worker sentiment has shifted and workers are advocating for workplace models that best support their needs and well-being. Many workers now consider the ability to work remotely as an inalienable right. According to a recent study,[1] two-thirds of workers globally (64%) say they have already considered (or would consider) looking for a new job if their employer wanted them back in the office full time.

Technology is also advancing rapidly as an essential component of workplace design. This goes beyond collaboration tools and now includes a vast array of work-related technologies, with the most prominent example arguably being the metaverse and unlimited reality.

As organizations reimagine the workplace in a postpandemic world, the result is not a single location or one-size-fits-all solution, but a variety of capabilities and spaces that support different ways of getting work done. This reimagination is not just limited to knowledge workers, but also extends to frontline workers. A recent survey by Forbes and Microsoft[2] showed that organizations leading the way on digitally empowering frontline workers (e.g., call center representatives, field service personnel) are three times more likely to deliver annual growth in excess of 20% (compared to their less forward-thinking counterparts).

The readiness gap

According to the Deloitte 2023 Global Human Capital Trends survey, the vast majority of business leaders (87%) believe that developing the right workplace model is important or very important to their organization's success. Yet only 24% feel their organization is very ready to address this trend (figure 1).

FIGURE 1

The readiness gap for the future of workplace

Developing the right workplace model is important or very important to my organization's success

87%

My organization is very ready to develop the right workplace model

24%

Source: Deloitte 2023 Global Human Capital Trends survey.

The good news is that only 6% of our surveyed organizations are satisfied with the status quo and say they have not changed—and will not change—their workplace strategy. Meanwhile, 78% are trying to create a future workplace where workers can thrive by redesigning their existing business processes or reimagining the work itself.

SIGNALS: THIS TREND APPLIES TO YOU IF…

- Knowledge-sharing and the effective use of intellectual property are noticeably declining

- Ongoing challenges in collaboration are adversely affecting work delivery and resulting in a noticeable uptick in meetings

- Engagement and productivity are declining due to old models of work being ported into the hybrid workplace

- Your organization is struggling to attract top talent due to outdated or ineffective workplace strategies

The new fundamentals

Let the work drive the workplace decisions.
Before organizations can effectively answer any questions about *where* people should work—physical, digital, or hybrid—you must understand the work that needs to get done. To that end, the first question to ask when thinking about workplace is "What does the work require?" There is no perfect workplace model or universal solution that every organization should adopt. If the work does not require a physical space to deliver optimal results, don't force it just because of past precedent or current management anxieties. Instead, organizations need to look at the work they are trying to accomplish and cultivate a deep understanding of the unique needs and priorities associated with those goals. Only then can organizations effectively determine where, when, and how work should be done.

Deliberately design the experience in service of outcomes and value. As organizations design workplace models in support of the work, they should start by focusing on the ultimate outcomes they seek to drive (culture, innovation, societal impact) and then determine where that value is best created. According to the leaders who responded to the Deloitte 2023 Global Human Capital Trends survey, the biggest benefit they've seen from their future-workplace approach is increased worker engagement and well-being, while culture is the biggest barrier.

Empower the individual, the team, and the ecosystem. Especially in light of rising worker agency, outcomes important to the workers in an organization's ecosystem should be given equal consideration as those of the organization. That goes for workplace models as well. Organizations should do their best to align (or at least balance) their needs and desires with the needs and desires of their entire workforce. Organizations have the opportunity now to experiment boldly with their workplace model, balancing work outcomes with worker preferences, to unlock the new value they seek to create.

For example, consider where and how people interact. Studies show that collaboration is the No. 1 purpose for a physical office—a finding that applies regardless of geography, industry, role, or generation.[3] As such, when creating a workplace model—whether physical, digital, or hybrid—you need to intentionally design it to support and foster connectivity and collaboration.

Current experiments: What leading organizations are exploring

- **Unilever** is focusing on what people produce (outcomes), not where or when they work.[4] It has introduced a set of global principles on how to make the best use of office spaces—giving people flexibility and choice, while spending at least 40% of their time in the office to collaborate and connect. To that end, it is designing working options that can help people balance work and home life without completely losing the value of face-to-face contact.

- **BMW** is bringing the metaverse to a traditionally physical environment: the factory. Using NVIDIA's Omniverse, a 3D collaborative metaverse platform, the company has created a perfect simulation of a future factory (i.e., digital twin).[5] The future factory was designed entirely in the digital realm and simulated from beginning to end to train and remotely connect workers in a virtual 3D environment. In this digital factory, BMW's global teams can collaborate in real time to design and reconfigure its factories, revolutionizing their planning process and eliminating the need for travel. Workers can travel virtually into an assembly simulation with a motion-capture suit and record task movements, while the line design is adjusted in real time to optimize line operations, worker ergonomics, and safety.

- **FamilyMart**, a convenience store chain in Japan, is experimenting with remote-controlled robots to stock shelves, enabling employees to work from anywhere using virtual reality (VR) goggles and controllers.[6] A key fringe benefit of this solution is the ability to employ disabled people who lack the physical mobility to stock shelves without the assistance of robots.

- **AdventHealth** added virtual nurses to its care teams, which enhanced its workforce experience for nurses across the digital and physical workplace and enabled better teamwork and patient outcomes.[7] Units can now have a virtual nurse team member on the screen, working with a team that's in person. As a result, virtual nurses not only offload work from the in-person nurse, but provide care virtually with good outcomes and a good patient experience.

- **M&T Bank** is focusing on putting purpose at the center of its post-pandemic workplace strategy.[8] In the pandemic, all of its nonessential workers were virtual. As things opened up, it promoted hybrid work—not because work couldn't be done virtually—but because it believed that the workplace created community and connections—in the company and with its diverse customers and communities in its footprint.

A number of these innovative experiments revolve around the *metaverse*, which is changing how organizations think about the digital workplace and providing new digital tools to foster collaboration and create an immersive workplace experience from anywhere in the world. Benefits of the metaverse include the ability to work remotely day or night from any location, and to stay anonymous and focus on work. Gartner predicts that 25% of people will spend at least one hour a day in the metaverse by 2026.[9] Also, three out of five tech workers say they would be interested in using the kinds of VR headsets associated with the metaverse for training and professional development.[10]

The path forward

FIGURE 2

Survive. Thrive. Drive.

Survive	**Thrive**	**Drive**
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Deconstruct work to its lowest level and define work outcomes to determine where work would best be performed • Consider *how* workers interact, not just *where* • Inventory your current workplace, including digital and physical sites and how and why each is used	• Design your workplace experience with work at the center • Give a voice to workers and teams about how to foster more connectivity, collaboration, and innovation through workplace design • Pilot new workplace approaches and gather worker feedback • Design your workplace ecosystem to allow for a seamless transition between physical, digital, and hybrid workplaces	• Take an agile approach to improving the workplace experience, including continuous assessment of breakthrough technologies • Lead the intersection of ESG and human risk with workplace design • Cultivate openness among leaders to workplace experimentation and change

Source: Deloitte analysis.

Looking ahead

The workplace is essential—but in the relationship between work and workplace, the work has to lead. The workplace should become an input into the work itself, focused on the outcomes or value aligned with business strategy. Beyond the immediate value from the work, a strategic approach to workplace can also create "downstream" ESG benefits. For example, reducing an organization's amount of physical office space can reduce its carbon footprint; giving workers more agency to choose which days to work remotely could support DEI outcomes by providing flexibility for caregivers.

Through workplace design, organizations have an opportunity to improve their brand, attract talent, and elevate work outcomes. And it all starts with one key question: "How can we design the workplace to best support the work itself?" Organizations that put work at the center of their workplace design efforts will have the best chance of achieving superior results. As with other trends in this year's report, the needs of the work and worker preferences will continue to change, requiring organizations to continue experimenting, listening, and evolving.

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Acknowledgments

Negotiating worker data

Organizations and workers vie for control of worker data when they should focus on mutual benefits

Coauthored by Martin Kamen, Tara Mahoutchian, and Nate Paynter.

As organizations continue to expand the worker data they collect—data about behavior, communications, social connections, and even keystrokes and mouse clicks—a negotiation is emerging over who controls that data and how it gets used. The key to success is finding ways to use worker data, which benefits organizations and workers alike, even as regulations continue to evolve.

ALTHOUGH ORGANIZATIONS HAVE long sought to tap into the value of worker data, many continue on their journey to make the most of the information they are collecting. Meanwhile, many workers still don't have a holistic understanding of what data is being collected and how it is being used—and receive little benefit from its usage. These challenges have only increased as technologies more easily collect and analyze vast and growing amounts of worker data, and the required skill sets and capabilities needed to leverage this data evolve just as quickly.

In addition to traditional information such as demographic data, survey results, and performance metrics, organizations are now collecting data on worker skills, behaviors, and interactions (both inside and outside the workplace). This expanding data set is becoming more valuable as organizations increasingly view it as a strategic asset to inform key business and workforce decisions and enhance their analytics capabilities accordingly to harvest its value. Christopher Westcott, a people experience leader in finance, highlighted the power of worker data to transform

the business when he said: "We don't have to do guesswork anymore. We have opportunities to collect information about individual aspirations, skills and capabilities, and where we need help most in the organization. New tools and technologies put that data at our fingertips, and we'll use it to create more effective workforce plans. More importantly, we'll use this data to help people see meaningful career paths in a way we never could before."[1]

In an era of rising agency where workers have more choice, power, and influence than ever before, workers are starting to fight for a higher degree of control over their data—as well as mutual benefits from its use. Much like their personal lives, workers choose to share data where it provides them value—e.g., wearable tech that guides their workouts—and choose not to share data when they're worried about how it's being used—e.g., customers declining cookies on sites they don't trust. This mentality is increasingly evident in their professional lives as well. According to a recent study published in *Harvard Business Review*, 90% of employees are willing to let their employers collect and use data about them and their work, but only if it benefits them in some way.[2]

Used appropriately, worker data can produce major benefits for organizations and workers. However, workers and executives alike still have concerns about surveillance in the workplace and the responsible use of worker data. The same *Harvard Business Review* study noted that only 30% of the executives whose companies use workforce data reported being highly confident about using the data responsibly.[3]

The regulatory landscape makes this discussion complicated across the globe. In Europe, it's good news for workers, as the General Data Protection Regulation (GDPR) protects EU workers by setting strict legal requirements for processing data. It restricts the types of worker data that can be collected and how such data is used. In the United States, companies often have wider latitude under relevant laws to collect and use worker data. In the Asia-Pacific region, examples indicate that governing bodies are the arbiters of worker data. Singapore's Ministry of Manpower collects and owns all data on Singapore's labor market, leveraging it to enhance organizational access to workers and improve employment practices and workplace experience.[4]
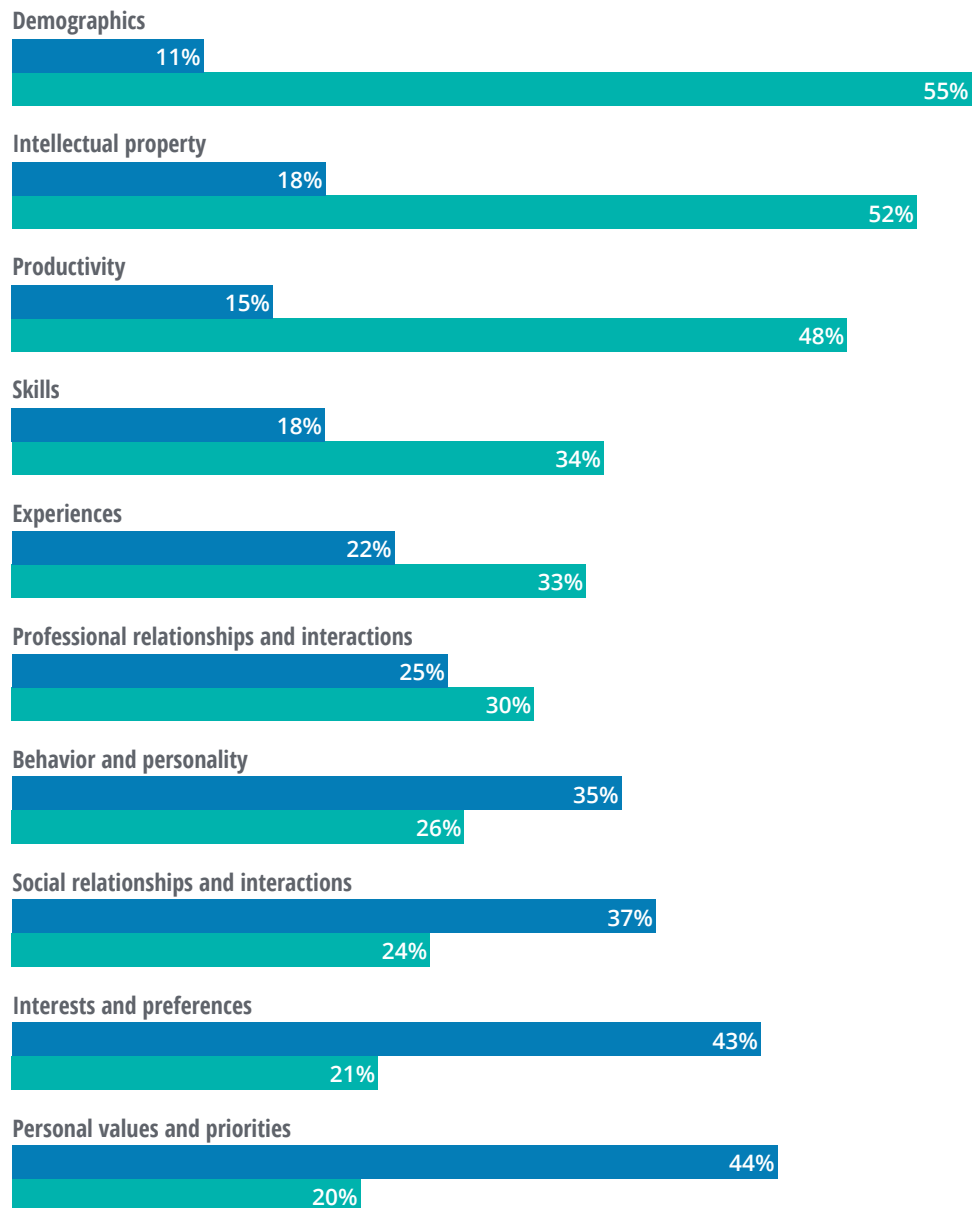
SIGNALS: THIS TREND APPLIES TO YOU IF …

- Your workers feel as if their every move is being monitored, increasing stress, job dissatisfaction, and turnover, and leading to a lack of trust.

- Conversations about worker data usage and value are increasing in labor union negotiations, worker listening and engagement forums, and other decision-making forums.

- Workers are sharing data more readily outside of the organization (e.g., LinkedIn, Glassdoor) but are reticent to provide it through organizational channels due to a perceived lack of benefit to them.

- Your organization faces increased challenges and pressure from regulators related to data reporting, privacy, and maintenance.

FIGURE 1

Perspectives on worker data ownership by organization vs. workers

■ Worker-owned ■ Organization-owned

Demographics
11%
55%

Intellectual property
18%
52%

Productivity
15%
48%

Skills
18%
34%

Experiences
22%
33%

Professional relationships and interactions
25%
30%

Behavior and personality
35%
26%

Social relationships and interactions
37%
24%

Interests and preferences
43%
21%

Personal values and priorities
44%
20%

Source: Deloitte 2023 Global Human Capital Trends survey.

As more governments start requiring companies to report environmental, social, and governance (ESG) data (such as workplace health and pay equity), this level of sensitive data requirements will intensify the negotiation over data control, specifically regarding collection and usage of worker data and mutual benefit. Organizations can help alleviate worker fears by proactively initiating conversations about worker data and benefits with their workforce.

The readiness gap

According to data from the Deloitte 2023 Global Human Capital Trends survey, the vast majority of business leaders (83%) believe that leveraging worker data to create benefits for both the organization and its workers (while building trust and confidence in how worker data is used) is important or very important to their organizations' success. Yet only 19% believe they are very ready to do so.

FIGURE 2

The readiness gap for negotiating worker data

Leveraging worker data to both organization's and employees' benefit while building trust and confidence in how that data is used is important or very important to my organization's success

| 83% |

My organization is very ready to leverage worker data to both the organization's and employees' benefit while building trust and confidence in how that data is used

| 19% |

Source: Deloitte 2023 Global Human Capital Trends survey.

When asked to identify top barriers to realizing value from worker data, 27% of respondents cited culture, making it the most common barrier. However, "culture" may be a broad proxy for

misaligned values or disagreements over if, how, or when worker data should be used.

The new fundamentals

Build trust and seek mutual benefits. Success will require building a relationship of trust between workers and their organization, government, or third party to use data in mutually beneficial ways. We are seeing signs that organizations are beginning to make decisions that are mutually beneficial. When asked in the Deloitte 2023 Global Human Capital Trends survey to identify the top benefits from their organization's approach to using worker data, the top response was increased worker engagement and well-being of the workforce. While organizations might want to control their worker data, many are ultimately using that data for their workers' benefit—as well as the organization's. For example, as the major impacts of the pandemic subsided, some organizations used worker interaction data to conduct network analysis and inform development of hybrid work practices.[5] Additionally, several startups are leveraging artificial intelligence (AI) to identify patterns based on worker interactions and communications and advise organizations on burnout risks.[6]

Data can also help workers improve their performance, as we discuss in more detail in our "Powering human impact with technology" trend. A global technology company is using cognitive AI tools to analyze worker data generated by their global sales teams to determine why some sellers do better than others and to make recommendations to improve the knowledge and win rates of their sales force.[7] By identifying patterns of behavior missed by humans, AI can recommend the next best course of action or even quick learning modules that improve the success of their sellers.

Embrace workers' desire to control their data. As workers recognize the value of their personal data, they are expecting more control of that data and influence over how it's being used. According to the Deloitte 2023 Global Human Capital Trends survey, a significant majority of organizations (61%) describe their existing data ownership structure as either *shared* or *worker-owned*. This represents a significant departure from the traditional model of full control by the organization. Organizations must accept this new reality instead of clinging to their old model of controlling all the worker data that they collect.

Use expanded worker data to create more, and mutual, value. Fortunately, expanded availability of worker data opens up new opportunities to create business value for everyone involved. Learnings can be taken from the trajectory of customer data, where, as expanded customer data became available, organizations developed sophisticated strategies and analytics to generate deep and valuable business insights from that data. Currently, leaders who responded to the Deloitte 2023 Global Human Capital Trends survey say the worker data that is most valuable to their organization is basic productivity data (i.e., data to make people work harder and/or smarter). However, over the next 2–4 years, more advanced data is expected to become valuable, including behavior data, personality data, and data about professional relationships and interactions. Along the way, rising worker agency will prompt organizations to hone their methods and balance business-oriented insights with insights that benefit the workforce.

From a technology and operations perspective, organizations must build on their current focus on establishing clean, accurate data to find ways to derive new insights by asking different questions, such as "How do we assess risk and reward and decide what data to gather?" and "Are we using our data to its fullest potential to serve our business and our workers alike?"

To achieve any degree of worker trust and control over data, organizations need to design the overarching data architecture, including workforce data policies that are transparent, accessible, and ethical (i.e., biometric data). Also, they need to recognize and reward teams (i.e., leveraging blockchain) for using data in ways that enhance individual and team performance. This helps reinforce data analysis as a core competency.

Current experiments: What leading organizations are exploring

- **Schlumberger** is using AI to help manufacturing workers improve performance and reduce worker fatigue.[8] Its Center for Reliability & Efficiency in Denton, Texas, collects, aggregates, and anonymizes video data and then uses AI to look for patterns. The data is never used to monitor how individuals work; however, any worker can privately opt in to see their own performance data. The data creates valuable benefits for workers and the organization—for instance, the company has used it to give workers more frequent but shorter breaks to combat productivity-sapping fatigue.

- **Telstra**, Australia's largest telecommunications company, has given its workers the ability to edit their own career data.[9] The company maintains an internal site called MyCareer, which is used to store career and skills data, and enable the organization to more effectively match talent to work. Workers are able to manage their own data and are given the ability to challenge any incorrect or incomplete inputs.

- **ABN AMRO** is on a journey to bring together all HR and enterprise data to create an integrated IT and data landscape, which will enable machine learning and nudges for employees on career-related topics like

development or open roles.[10] The Netherlands-based global bank is also rewriting its privacy statement to ensure more transparency for employees. A dashboard that includes data on employee experience, diversity, workforce, talent acquisition, and learning is accessible to all employees; this dashboard is also used by business leaders to make decisions regarding their workforce.

The path forward

FIGURE 3

Survive. Thrive. Drive.

Survive	**Thrive**	**Drive**
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Proactively understand your compliance requirements • Before capturing data, clearly define the intent of the organization and perform a risk analysis • Capture and organize worker data into logical categories to make data actionable • Secure worker data	• Evaluate how worker data benefits both the workforce and organization • Build trust by being consistently transparent with your workforce about what data you have and how you're using it • Enhance worker data protection through new approaches such as limiting data storage time and providing clear data notices for internal data sharing, remote data access, and disclosures to external entities/agencies	• Expand worker data to be inclusive of the full workforce ecosystem • Explore worker data elements that could be portable (goes with the worker) in order to drive value for the worker (e.g., skill profile) • Use advanced technology (i.e., blockchain) to store and protect data • Utilize AI to access worker data sets that unlock adjacent information and value

Source: Deloitte analysis.

Looking ahead

Earlier, we highlighted negative signals that suggest your existing approach to worker data might not be working. In contrast, here are some positive signals to help you sense if your organization's new approach to managing worker data is a success:

- Worker data is being used responsibly and workers widely consent to the use of their data for internal and commercial purposes and feel they are benefiting from it

- Your organization can use worker data with ease—and valuable insights are being generated from it

- There is a growing diversity of data to leverage across your workforce ecosystem

- As a business leader, you increasingly rely on worker data to guide the purpose and direction of your organization and workforce strategies

Ultimately, organizations, workers, unions, and government organizations will all need to become vested partners to gain tangible benefits from collecting and sharing worker data—not just

business-focused benefits from tracking performance (such as increased productivity and reduced rule-breaking), but broader benefits that promote mutual well-being.

With the volume and scope of worker data increasing every day, the issue of control is not going to go away. Organizations that tackle the issue sooner rather than later—finding ways to create mutual benefits both for themselves and their workers—will have a clear advantage when it comes to creating value and generating breakthrough insights from worker data.

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Acknowledgments

Harnessing worker agency

Organizations drive value and strengthen their relationship with workers by embracing rising worker influence

Coauthored by Karen Weisz.

Workers today have more choices and influence than ever before—and are increasingly willing to use that newfound influence to shape the actions and agendas of their organization. Business leaders need to harness worker passion and energy to create mutual benefits for everyone—not just for their workers and organization, but for the world as a whole.

A S NOTED IN the "Work as fashion" future we wrote about in our Deloitte 2021 Global Human Capital Trends special report, worker agency is on the rise.[1] In this future, workers have more choice and influence over the work they do—and over the organizations for which they work. Most recently, this has been a focus in the context of return to work, with worker agency misinterpreted by organizations to be solely about workplace preferences and organizations trying to express their power by dictating what "flexibility" should mean for the workforce.[2]

In reality, worker agency has multiple dimensions. One is worker *self-determination*, with workers wanting meaningful choice and influence over the work they do (and how, when, and where they work). Workers who quit a job in 2021 said no opportunities for advancement (63%) and feeling disrespected at work (57%) were reasons why they quit.[3] Another is worker *activism*, with workers wanting their organizations' values, strategies, policies, and actions to align with their own personal values across a wide range of issues, from environmental practices and social good to racial

and gender equity—and everything in between. A toxic corporate culture, for example, is 10.4 times more powerful than compensation in predicting a company's attrition rate compared with its industry.[4] Leading elements contributing to toxic cultures include failure to promote diversity, equity, and inclusion (DEI), workers feeling disrespected, and unethical behavior.[5]

This rise in worker agency is being driven by a confluence of factors, including:

- **Ongoing talent/labor shortages.** Today's workers have more job options and are less dependent on their organizations, emboldening them to demand what they want. This expectation of agency and influence will remain, regardless of fluctuations in labor supply. This is supported by data from this year's Deloitte Global Gen Z and Millennial survey[6], which found that a third of respondents would leave their job even without another one lined up. By shaping workforce strategies and practices that incorporate agency into their design, organizations can access the talent they need and build stronger and longer relationships with their workers.

- **Rising social consciousness.** Public awareness and action have risen sharply on a wide range of social, political, environmental, and economic issues, with individuals feeling an increased sense of empowerment and responsibility to stand up for what they believe in. Two in five Gen Zs and millennials have rejected a job or assignment because it did not align with their values around societal and environmental impact, and diverse and inclusive cultures.[7] By contrast, organizations who have committed to their organizational

purpose have observed improved benefits—50% of respondents to our Deloitte 2023 Global Human Capital Trends survey noted increased worker retention and well-being.

- **Technology advances.** Digital technologies make it easier for individual workers to create value without being tied to a specific organization or job. Also, they enable people to connect and communicate about issues in real time on a global scale and provide organizations with valuable insights about what is important to their workers. As an example, social media serves as both a microscope and a megaphone, amplifying voices to inform the decisions organizations make and hold them accountable for their actions on a larger, more public scale.

- **Low government impact.[8]** When governments don't offer support to workers—through, for instance, public policy and regulation to protect jobs and wages, enhanced social safety nets and benefits, better access to education, or investment in reskilling—workers will expect organizations to provide them. By doing so, organizations can increase engagement and retention.

The manifestations of worker agency vary by country and region due to differences in laws, social behavior, cultural norms, and the relationship between workers and organizations. Despite the local and regional variation, however, the overall trend is that workers are gaining more influence and choice than ever before—and are willing to use it to shape and steer company behavior, or just to determine their level of engagement and productivity, as witnessed by the "quiet quitting" phenomenon.[9]

This global trend is putting significant pressure on organizations to align their values, strategies, policies, and actions with the personal values of their workers (individually and collectively), and with the values of the larger society. Although this can be challenging, given different workers and different parts of society expect different things, the benefits to the worker, the organization, and society outweigh those challenges.

SIGNALS: THIS TREND APPLIES TO YOU IF...

- Workers are disengaged despite increased listening and what feels like continuous changing of worker programs and policies

- Your organization measures itself against competitor and industry benchmarks but still struggles to solve for the challenges most important to your business strategy and workforce

- Your business outcomes (financial, reputational, etc.) are suffering due to increases in worker protests and activism related to a mismatch of organizational and workforce priorities

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The readiness gap

In the Deloitte 2023 Global Human Capital Trends survey, 84% of the business leaders we surveyed say worker agency is important or very important to their organizations' success. Yet only 17% feel they are very ready to address the issue, the second lowest readiness score among all the trends surveyed.

FIGURE 1

The readiness gap for worker agency

Addressing an increase in worker influence and choice is important or very important to my organization's success

84%

My organization is very ready to address an increase in worker influence and choice

17%

Source: Deloitte 2023 Global Human Capital Trends survey.

According to the Deloitte 2023 Global Human Capital Trends survey, this gap is being driven by a recency bias with a focus on agency that is driven by the pandemic, such as compensation, location, and working hours, which surfaced as the top three areas (44%). In order to truly harness agency and drive increased value, the focus needs to be on areas such as purpose, voice, and work, which were the lowest three selected in our survey (16%).

The new fundamentals

Embrace the moving target. Harnessing worker agency for greater value requires a recognition that this is not a fad—attention to it is not optional. Additionally, the shared goals you create with your workers today will not be evergreen because what's important to people changes frequently. Cocreation is as much about sharing in what questions are asked as the answers reached. The implication is that cocreating this relationship needs to become an embedded set of practices between the organization, its workers, and those who represent them. Deloitte's High-Impact Workforce Architecture research describes this as cultivating a

"creator's mindset" on the part of the workforce—instilling a desire to not just adapt to changes as they come but to actively contribute to shaping the organization's future.[10] A creator's mindset has benefits for the worker: They are more resilient in the face of the change they had a part in creating and are more apt to feel a strong sense of belonging given the direct line of sight to contribution that comes with cocreation.[11] It also has benefits for the organization—the Workforce Architecture study found that organizations that cultivate this creator's mindset are 1.8 times more likely to delight customers and 2.8 times more likely to innovate versus those that don't.

Shared journey, shared outcomes. Workers and organizations need to be in continuous dialogue, with forums and outcomes that are shared. While listening to workers' preferences and opinions is a prerequisite to this set of practices, it is not sufficient to create a meaningful, impactful relationship. Organizations need to activate workforce contribution into formal decision-making forums that impact business outcomes. This activation can take many forms depending on the size of the organization, regulations, and involvement of labor unions and works councils. This type of shared decision-making provides both empowerment and agency to the worker and improves business outcomes. For example, in Germany, employee works councils are required by law for all companies with more than five employees.[12] These works councils have rights extending from day-to-day issues, such as holidays and payment methods, to economic aspects, such as an organization's investments, site closures, and potential takeover.[13]

Focus on specific decisions that support your worker–organization relationship aspirations. It is not practical or efficient for organizations to embed worker agency into every facet of the business. Rather, organizations should focus on embedding workers into the processes and forums that help build the type of worker–organization relationship aligned with the organization's values and goals. For one organization, this may mean rallying to a common purpose, whereas for another organization, it may mean focusing on design of the work.

Commit to making it real. These actions can't be lip service for organizations and workers to achieve the mutual benefit outlined at the beginning of this section. If workers commit and organizations fail to meaningfully integrate workers' perspectives into business practices, workers' trust will be undermined, and they are likely to disengage. "Making it real" could look like matching workers with work assignments, tasks, or initiatives that align with their values, interest, and skills—turning passion into productivity. Depending on the relationship that organizations and workers have, both parties could potentially expect workers to find meaning and purpose largely outside of work ("work is work" future[14]). In this case, "making it real" could mean cocreating with the worker on the work itself, rather than focusing on purpose.

Current experiments: What leading organizations are exploring

- **Novartis** recently introduced a "Choice with Responsibility" policy that empowers employees to choose how, where, and when they work within their country of employment.[15] The policy shifts responsibility from manager-*approved* to manager-informed and is designed to optimize both personal and business performance.

- **Haier** enables choice and autonomy on what to work on by letting any employee join or create one of its thousands of microenterprises, and then shares the wealth with them.[16] Although base pay is modest—often not much more than minimum wage—teams that achieve their "leading targets" can multiply their salary by 5–10 times. Frontline teams have the freedom to run their businesses as they fit.

- **The Commonwealth of Massachusetts,** , as it continues to position itself as an employer of choice, has increased its workplace flexibility to attract and retain talent.[17] Its leaders and managers continuously solicit work preferences from their individual employees and teams to create hybrid schedules that balance those preference with operational needs. Not only has this increased workplace flexibility led to greater workforce retention rates, but the improved two-way communication that started within this hybrid environment has enabled leadership to hear directly from their workforce about the issues, challenges, and opportunities they're facing.

- **M&T Bank** has created a program that gives employees 40 hours of paid volunteer time to spend on any effort aligned to their passions.[18] This program allows their workers align their individual choices, actions, and values with the organization's overall purpose to "make a difference in people's lives."

The path forward

FIGURE 2

Survive. Thrive. Drive.

Survive	Thrive	Drive
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Collect worker sentiment and perspectives on the most important underlying needs, then use those insights to inform decisions • Communicate how worker and worker representation input influences your organization's priorities and actions • When prioritizing, focus on action rather than process, creating a "minimum viable policy" (the smallest amount of policy required to protect the organization)	• Create structures and processes that directly involve workers and their representation (i.e., works councils, labor unions) into decision-making forums and policy development • Foster self-organizing teams or worker "discovery teams" to connect promising ideas with areas of worker passion • Leverage continuous sensing and an ongoing dialogue with workers to proactively understand changes to motivations and needs • Offer a series of manageable, modular choices to workers that empower them without leaving them feeling overwhelmed	• Increase worker representation at the highest levels of decision-making (such as the board or executive leadership team), especially on ESG and DEI issues • Train leaders in psychological safety and the art of listening • Grant autonomy and choice in work by letting workers flow to projects, tasks, problems to be solved, and outcomes to be achieved

Note: There are geographical differences in regulatory requirements for worker representation (e.g., works councils in EU countries).
Source: Deloitte analysis.

Looking ahead

Worker agency doesn't mean you need to let workers dictate everything your organization does, nor does it mean creating structures for workers to share perspectives that aren't actioned upon (i.e., board committees with minimal influence). It's a two-way collaboration, not a free-for-all. But a free-for-all isn't necessary to fulfill workers' desire for influence and control. What's needed is an open, respectful relationship that gives workers meaningful, mutually beneficial choices and brings them into the decision-making process on issues that touch the workforce. Workers should be included in decisions at the strategic level of the organization, such as facility and operations locations, and can also be included in decisions at the individual level, like work schedules.

And while it may be tempting for leaders to "wait it out" when it comes to these decisions, the shift in worker sentiment and rise of worker agency will not change or "go back to normal" regardless of workforce supply and demand changes or an economic downturn. With the pace of business, workforce, and societal disruption, workforce agency provides the level of agility needed to navigate these disruptions.

Ultimately, worker agency can be a potent source of motivation unto itself. Psychological research links agency to motivation and behavior, as well as to physical health and overall well-being.[19] A key

takeaway is that giving people influence and freedom of choice is often just as important as the actual choices you offer them.

Organizations should start by acknowledging and embracing workers' desire to share authorship of the organization's future and then cocreating that future based on bilateral input. The resulting relationship is one where both organizations and workers have a seat at the table, sharing both authority and accountability. Together, they solve challenges and realize benefits, based on purpose, the work itself, or other mutually agreed-upon factors.

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Acknowledgments

Unlocking the workforce ecosystem

Removing traditional employment distinctions unlocks access to a true workforce ecosystem— and with it, critical skills and worker potential

Coauthored by Karen Weisz.

Organizations increasingly rely on nontraditional workers for skills and activities that are high value and strategically important. Yet, their workforce strategies and practices are still designed for traditional workers. To unlock the full benefits of the entire workforce—which include improved business agility and scalability, expanded access to talent, and improved worker productivity and performance—you need to think of your workforce as an all-inclusive, boundaryless ecosystem, where different types of workers have different needs and make valuable contributions in different ways. This requires workforce strategies, processes, systems, and programs that maximize the unique contributions of different worker types while supporting them all in a more consistent way.

THE REDEFINITION OF the workforce began well before the pandemic. However, it has accelerated as the talent shortage and reliance on traditional work models have strained organizations' ability to access the critical talent they need. Workers are also demanding increased flexibility over their lives and work, which nontraditional employment models can deliver.

Contingent workers already comprise a significant portion of the total labor pool (near 30%, according to some studies).[1] And over half of workers

surveyed (55%) say they already have, or are likely to, switch employment models throughout their careers, fluidly moving between traditional full-time jobs, internal opportunities outside of their formal jobs (perhaps via a talent marketplace), and freelancing/gig work.[2]

The shift is being fueled by several related trends, including:

Rise of worker agency. Workers of all kinds are gaining the power to influence/dictate how and where they work (and for whom).

Shortage of talent. Organizations are struggling to find the talent they need and are willing to take talent in whatever form they can get it.

Need for increased agility. Today's organizations need the ability to change directions quickly—and adjust their talent accordingly.

Generational preferences. Younger generations view work and careers differently and don't necessarily see themselves working full time over the long term for a single organization.

Rise of digital technology and the nontraditional workplace. Technology advances are making it possible for people to work productively from an anywhere-anytime-any-workforce model.

Shift to skills-based organizations. Forward-thinking organizations are shifting their primary focus from jobs and job titles to skills. This aligns well with an ecosystem mindset that values workers for the skills they provide, regardless of their employment status.

Although adoption has increased, organizations have yet to unlock the full value of the workforce ecosystem, which requires creating a better sense of belonging and a unified experience across that ecosystem. Currently, nontraditional workers are often treated as outsiders, typically not included in organizations' workforce planning, unable to access development opportunities, and not effectively recognized for their contributions to the business, all impacting productivity and personal engagement. A true workforce ecosystem requires organizations to shift their mindset, culture, work strategies/practices, and platforms/data access.

Finding better ways to integrate nontraditional workers into the workforce and culture will help give organizations expanded access to the crucial skills and talent necessary to thrive. It will also help unlock the full potential of that talent, while improving the organization's ability to scale up and down or shift focus more rapidly in response to changes in the marketplace. This is confirmed by data from the Deloitte 2023 Global Human Capital Trends survey, which reveals the top two drivers to optimize the workforce ecosystem are the workforce ecosystem's ability to meet the current demand they have (46%) and provide the agility they need for the future (36%).

SIGNALS: THIS TREND APPLIES TO YOU IF …

- You are struggling to find the talent you need with the critical skills to execute your business strategies

- Your listening/sensing uncovers morale and engagement concerns on teams composed of traditional and nontraditional workers

- Access issues to data, collaboration tools, and work systems for your nontraditional workers are negatively impacting productivity

The readiness gap

According to the Deloitte 2023 Global Human Capital Trends survey, 84% of business leaders recognize the importance of inclusively leading an expanding workforce, including those inside and outside the organization. However, only 16% believe they are very ready to do so, representing the lowest readiness score (figure 1).

FIGURE 1

The readiness gap for workforce ecosystems

Inclusively leading an expanding workforce, including those inside and outside the organization, is important or very important to my organization's success

84%	

My organization is very ready to inclusively lead an expanding workforce, including those inside and outside the organization

16%	

Source: Deloitte 2023 Global Human Capital Trends survey.

Traditionally, organizations have tried to adapt through tweaks and workarounds to their traditional workforce models and policies. However, we're now at a point where duct tape and baling wire aren't good enough and fundamental changes are required. The top two barriers to unlocking the workforce ecosystem, according to the Deloitte 2023 Global Human Capital Trends survey, were the need to shift culture (27%) and ways of working (26%).

The new fundamentals

Adopt a workforce ecosystem mindset. Moving forward, you need to think of your entire pool of workers (and future workers) as a boundaryless ecosystem—treating all types of workers as highly valuable and integral to the business. This includes not only explicitly factoring nontraditional workers into your workforce strategies and plans, but also integrating all workers into your organization's culture (whether they are full-time or part-time workers; remote or in-person). Every single person who contributes work to your organization should reflect its core values and feel like part of the culture. Interestingly, despite being overlooked at an organizational and system level, data from *MIT Sloan Management Review* and Deloitte reveals that a vast majority of global managers (93%) already consider both internal and external workers to be part of their workforce, indicating that managers may have already adopted this mindset.[3]

Take a skills-based approach. As noted in the "Navigating the end of jobs" chapter, a growing number of forward-thinking organizations are moving away from the centuries-old workforce model that is built on a foundation of formal, narrowly defined jobs and job titles. In its place, they are adopting a new skills-based approach centered around skills, capabilities, and interests. This shift aligns perfectly with the concept of a workforce ecosystem, focusing on the work that needs to get done—and skills required to do it— rather than worker type or job title.

Create an open workforce platform. Instead of having completely different approaches and platforms for traditional and nontraditional workers, adopt an open approach to talent that unlocks the full potential of every type of worker while providing greater consistency across your entire workforce ecosystem:

Open. Develop workforce strategies and plans that recognize and embrace the unique value and contributions of all types of workers, as well as their unique needs and preferences.

Integrated with speed. Ecosystem platforms need to be integrated with business strategies to flexibly adapt to changing work and customer needs.

This isn't to suggest all workers should be treated identically. Different types of workers have different needs, contribute value in different ways, and choose different trade-offs. For example, traditional full-time employees typically receive extras such as full benefits and greater job security in exchange for dedicated focus, availability, and loyalty to a single employer. Other worker groups get fewer perks in exchange for higher hourly rates and increased flexibility. To attract and harness crucial talent, it's important to respect those personal preferences.

Pivot from directing to orchestrating.
Preparing organizations and managers to operate in a workforce ecosystem requires new management practices, shifting away from legacy command-and-control approaches to cross-functional alignment and integration, to effectively access, engage, manage, and develop external workers in ways that were previously reserved for traditional employees. Today, it is common for external workers to be influenced by many different groups, such as human resources, procurement, technology, and business development, which often do not communicate with each other about external worker processes and practices. Going forward, functional and business unit leaders need to work together to purposefully and systematically think about the holistic workforce ecosystem. These new relationships may require fundamental changes in management practices, technology, integration, and leadership, which all underpin an organization's ability to successfully orchestrate workforce ecosystems.[4]

Current experiments: What leading organizations are exploring

- **Faith-based health care providers** in the United States are exploring the creation of a consortium to develop and share talent that can be deployed across multiple member systems; build a more attractive, collective employer brand; and address talent challenges and shortages within health care. This also creates deployment flexibility within the consortium and expanded career opportunities and agency for workers, who have shared access to multiple organizations within the consortium.

- **Two large media companies** going through a merger are shifting the workforce ecosystem paradigm as they seek to harmonize their two businesses and workforces. While traditional workforce integration approaches would consider employees first and only, these companies intentionally began their workforce integration work by looking at external workers first and then "zooming in" to traditional employees. This shift will enable the organizations to better identify areas of focus and overlap to achieve synergy targets and align on the right growth plays for the future integrated organization.

- **Novartis** is integrating the management of its 100,000-plus internal workers and 50,000 external workers under the umbrella of the People & Organization function to offer a seamless experience and a holistic workforce strategy. Building this integrated view will enable leaders to think intentionally about the desired balance of internal and external workers, basing those decisions on the specific needs of the business and considering factors such as availability of skills, speed to access, and affordability.[5]

- **Unilever** employs more than 150,000 people worldwide, but the outer core of the consumer goods company's workforce—people, third parties, and agencies—is estimated at 3 million. Senior leaders at Unilever are working to digitize data and insights about the external workforce as a prerequisite to upskilling external workers in addition to employees, to create a more flexible and agile workforce.[6]

- **M&T Bank** partnered with a regional coalition of nonprofits, local governments, and educational institutions to address unemployment and underemployment in Western New York (WNY) by training community members in high-need skills.[7] The WNY Tech Skills initiative provides free courses in skills such as data analysis, UX design, and software engineering, and is designed to promote economic stability and health within the community, while building the broader ecosystem of talent in the region which all companies can access.

- **Local government and nonprofits** are responding to increasing workforce development challenges across the Greater Mesilla Valley region in New Mexico. The Las Cruces Chamber of Commerce and The Bridge of Southern New Mexico hosted a summit with leaders from government, private industry, higher education, and the community, to build a coalition for a self-sustaining local workforce ecosystem in the region. The summit centered on strategies to recruit, develop, and retain local talent, particularly in light of increasing worker agency. This coalition approach demonstrates a true ecosystem mindset, as government and private companies come together to build a collective development approach for their workforce.

The path forward

FIGURE 2

Survive. Thrive. Drive.

Survive	Thrive	Drive
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Understand your holistic workforce, comprising all those that perform work for your organization, to inform your strategic workforce planning efforts • Ensure all workforce reporting capabilities also include the holistic workforce • Recognize your engagement strategies (e.g., town halls) must include the holistic workforce • Understand costs and risks associated with nontraditional workers	• Expand talent strategies and practices to include your full workforce ecosystem where appropriate and aligned to employment laws • Create an integrated engagement strategy for the full workforce ecosystem • Provide appropriate access to your platforms	• Use skills, not jobs, as the foundation for accessing critical talent • Encourage traditional employees to get outside experience and skills • Tap into the full workforce ecosystem to positively influence outcomes in areas such as sustainability, DEI, and human risk • Enhance leadership capability and mindset to successfully orchestrate the full workforce ecosystem

Source: Deloitte analysis.

Looking ahead

Instead of clinging to the traditional, narrow definition of "workforce"—which prioritizes full-time employees and treats everyone else as "other"—organizations need to adapt their mindset and practices to fit the real-world talent pool, which is far more complex and increasingly comprised of nontraditional workers with skills and experiences that are high value and strategically important.

The new workforce fundamentals—such as an ecosystem mindset and open workforce platform—aren't just better for the current and future workers in your ecosystem; they are better for your organization too—giving you access to more and better talent; helping you get the most value from

different kinds of talent; and providing more flexibility to scale up and down or shift focus in response to the changing needs of your business and marketplace. Respondents to the Deloitte 2023 Global Human Capital Trends survey, who have made strides to optimize their approach toward workforce ecosystems, also report increased innovation, financial performance, retention, and a stronger leadership pipeline.

Chris Ernst, chief learning officer at Workday, said, "Harnessing the power of the ecosystem allows our business to get work done in a much more inclusive, agile, and flexible way. At Workday, we use Career Hub, where employees can share their current skills and interests, and receive relevant connections, gigs, curated learning content, and recommended jobs to help them on their career

journeys. We've had over 2,100 workmates (about 12% of our workforce) participate in gigs. It's really been an organic adoption and we've been able to quickly expand from small, short-term gigs to multiple month gigs that are connecting employees to opportunities to solve business challenges."

Organizations have been pursuing these objectives for decades but always had to design solutions around the boundaries of the traditional workforce model. With an ecosystem mindset and open workforce platform, those traditional boundaries are removed, enabling leaders to maximize the contributions of every worker, regardless of their work arrangements.

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Acknowledgments

Taking bold action for equitable outcomes

The DEI conversation shifts from activities to outcomes

Coauthored by Devon Dickau.

Diversity, equity, and inclusion (DEI) are often treated as a single monolithic objective, rather than separate but mutually reinforcing sets of actions—with diversity and inclusion being necessary prerequisites to achieve equitable outcomes. DEI progress has traditionally been measured based on activities and effort, often with little consideration for actual outcomes achieved. DEI actions should be in service of achieving equitable outcomes in the workforce—and broader society—while boosting an organization's innovation, competitiveness, and long-term business success.

N THE LAST two years, large multinational organizations made more than 1,000 public DEI commitments and pledged more than US$210 billion to DEI initiatives,[1] inviting increasing accountability for DEI-related promises. Workers across the ecosystem, customers, suppliers, shareholders, and society now expect organizations to fulfill their commitments and responsibility to make a positive impact on the world[2] not simply by demonstrating activity but by proving progress and living up to the expectations of a social enterprise.[3] For example, Generation Z and millennial workers who are satisfied with their employers' societal and environmental impact, and their efforts to create a diverse and inclusive environment, are more likely to want to stay with their employers for more than five years.[4] Meanwhile, performative actions— those focused on appearing to address issues

without the commitment of time and resources to achieve real outcomes—may erode trust in leadership and the organization, potentially impacting attrition and employer brand, particularly among marginalized identity groups.[5]

Some organizations are making progress on DEI actions. Specific to *diversity*, there has been a 1% increase in the representation of women in the global workforce since 2017, and a 6% rise in the number of women in C-suite roles (although only 26% of C-suite roles are filled by women).[6] As it relates to *inclusion*, we have observed that many organizations are making progress in that there are increased perceptions of being able to bring one's "authentic self" to work. This is the case at Deloitte, as our *2022 DEI Transparency Report* reveals a year-over-year increase in the perceptions of bringing one's "authentic self" to work across several identity groups.[7]

However, actions and programs that are diversity- or inclusion-focused do not always result in equitable outcomes. As an illustration, many organizations have developed leadership programs for women in pursuit of more gender diversity in senior leadership roles. These programs often are intended to promote diversity and enable a culture in which the program participants feel included. Yet, many organizations may not update systemic processes, such as internal mobility or performance management practices, which may serve as barriers to equitable advancement. A focused program does not guarantee *equity* for those program participants. Instead, equity acknowledges that the organization as a system is designed to give everyone—with both consideration for and regardless of identity—equitable opportunities to thrive. While the representation of women in the workforce may be increasing globally,

the fact remains that for every 100 men who are promoted, only 87 women are promoted—and women leaders are still leaving organizations at higher rates than men.[8]

Organizations face four common challenges in furthering DEI progress:

- **Too much emphasis on activities, not enough on equitable outcomes.** According to the Deloitte 2023 Global Human Capital Trends survey, 23% of organizations measure progress regarding diversity commitments through adherence to compliance standards—which may focus on activities instead of the impact of those activities. For example, the existence of mentoring programs for specific identity groups versus the outcomes those programs produce such as intent to stay and perceptions of fairness.

- **More focus on solving for the individual than on solving for the system.** Organizations typically prioritize DEI activities that address professional development, unconscious bias, and inclusive behaviors at the individual level. Often this comes in the form of training alone, yet research shows that individual-focused DEI training alone, which is point-in-time and widely distributes accountability, generally does not instigate the behavior change required to improve equitable outcomes.[9] Focusing on the individual is insufficient in overcoming the underlying institutional (within the organization) and structural biases (acknowledging that an organization is a system within broader systems of culture and society) that are barriers to DEI progress.

- **Over-aggregated data to report progress or results.**
  Many organizations do not proactively collect and synthesize data needed to deliver actionable insights on DEI beyond workforce representation (i.e., diversity)—and even then, the data may be over-aggregated, making it difficult to surface equity challenges facing specific identity groups. For example, organizations often track internal mobility of workers by identity groups, but fewer analyze internal application rates to understand potential disparities in the number of attempts to apply for internal roles—potentially surfacing inequities across identity groups in accessing internal mobility opportunities.

- **A disconnect between DEI objectives and other business objectives.**
  Social enterprises prioritize societal value as a component of (not separate from) business outcomes. Deloitte calls this the "Purpose Premium," suggesting that organizations with a focused strategy that articulates the differentiated role it serves in society realize value and competitive advantage through improved reputation, innovation, market valuation, operational efficiency, risk mitigation, and talent outcomes.[10] Similarly, decades of research has revealed correlations between more diverse and inclusive organizations and core business objectives such as innovation and profit. Yet, according to Deloitte 2023 Global Human Capital Trends survey respondents, only 15% (diversity) and 30% (inclusion) indicate that their organizations connect diversity and inclusion progress—which contribute to equitable outcomes—to business outcomes such as increased profitability or productivity. Equitable outcomes should be considered business outcomes, not separate from "the business." Senior executives, in collaboration with DEI leaders, should consider taking the lead on systemic change. Although more than 90% of CEOs have built DEI into their strategic priorities/goals,[11] bold actions are required to achieve equitable outcomes.

GLOSSARY OF DEI TERMS

Equitable outcomes are when all people have fair access, opportunity, resources, and power to thrive, with consideration for and elimination of historical and systemic barriers and privileges. Equality, by comparison, is when all people are treated identically, without consideration for historical and systemic barriers and privileges.

Diversity is the representation, in a group, of various facets of identity, including (but not limited to) race, ethnicity, nationality, gender identity, LGBTQIA+ identity, socioeconomic status, ability, religion, geography, education, and age.

Inclusion is the actions taken to understand, embrace, and leverage the unique strengths and facets of identity for all individuals so that all feel welcomed, valued, and supported.

Systems are sets of things working together as part of a mechanism or an interconnecting network. Society is a system that includes organizations. Organizations are systems. Within organizations, the talent life cycle is a system. Therefore, a change in one part of the talent life cycle can impact other parts of the talent life cycle.

The readiness gap

In the Deloitte 2023 Global Human Capital Trends survey, 86% of the business leaders we surveyed say embedding DEI into everyday ways of working and teaming while measuring outcomes is important or very important to their organizations' success. Yet only 25% feel they are very ready to address the issue.

FIGURE 1

The readiness gap for DEI

Embedding DEI into everyday ways of working and teaming while measuring outcomes is important or very important to my organization's success

| 86% |

My organization is very ready to embed DEI into everyday ways of working and teaming while measuring outcomes

| 25% |

Source: Deloitte 2023 Global Human Capital Trends survey.

According to the Deloitte 2023 Global Human Capital Trends survey, most organizations have prioritized diversity and inclusion actions over equitable outcomes. In fact, the top benefits of organizations' DEI efforts are primarily focused on inclusion-related outcomes such as "worker engagement and well-being." Meanwhile, equitable outcomes such as "stronger leadership pipeline and

increased talent access" and "contributions to positive community or societal outcomes" fall within the bottom four, along with "increased innovation" and "enhanced ability to anticipate future disruptions and agility in meeting business and workforce needs."

Looking ahead 2–4 years, surveyed respondents expect their organizations' DEI efforts to have a large impact on "increasing brand recognition" (27%), but much less of an impact on achieving equitable outcomes such as a "stronger leadership pipeline or increased talent access" (9%) and "contributing to positive community or societal outcomes" (10%). What's more, 24% of organizations are not establishing accountability or measuring progress in their equity commitments. Our conclusion in evaluating these survey results is that there may be a DEI "commitment drift" on the horizon.

The new fundamentals

Re-orient to outcomes, not activities. It's important to measure DEI success according to DEI outcomes (that is, what is changing?), not what is being done (such as dollars spent, trainings completed, or participation in affinity groups). Organizations should identify the specific inequities that exist across identity groups within their own organizations, uncover the root causes of those inequities, and design interventions and

solutions to address them. Just as every business strategy is tailored to the individual organization's customer needs, achieving equitable outcomes requires a tailored approach specific to each organization's strategy, context, and history of engagement with communities.

Focus on the system, not the individual.
Inequity is a dynamic, systemic challenge requiring a systemic response. Deloitte's Equity Activation Model (figure 2), introduced in *The Equity Imperative*,[12] presents a systems-based view of how businesses can activate equitable outcomes within and outside of their own organizations. The model is structured around three primary spheres of influence (each of which includes activators and enablers) that are within every organization's reach: workforce, marketplace, and society, all of which are encircled by organizational culture.

To unleash an organization's potential to make DEI impact in the marketplace and society at large,

organizations should first prioritize equitable outcomes for the workforce. Yet, many DEI efforts have historically focused on single workforce processes (such as talent acquisition or succession planning) rather than the interconnected system of workforce processes across the talent life cycle. Systemic change requires that DEI efforts cascade across the talent life cycle and traverse multiple talent processes to mutually reinforce equitable outcomes.

Produce disaggregated actionable insights, not aggregated descriptive data.
Disaggregated data can uncover equity barriers that exist at each stage of the talent life cycle, enabling an understanding of the unique root causes associated with individual and intersectional identities. A comprehensive assessment can reveal moment-in-time inequities and establish a baseline for continuous sensing to enable immediate intervention and predictive modeling to address the needs of specific identity

FIGURE 2
Deloitte Equity Activation Model
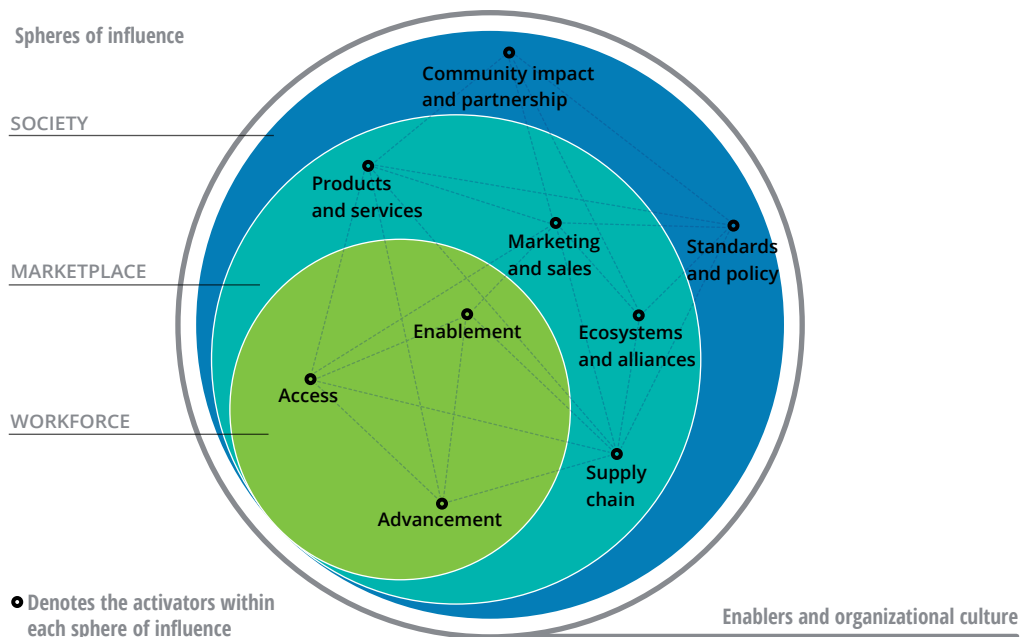
Source: "The equity imperative: The need for business to take bold action now," Deloitte, February 2021.

groups. For example, in disaggregating talent experience data among people with disabilities (rather than people with disabilities versus those without), an organization may learn that workers with physical disabilities and workers with learning disabilities experience a variance in outcomes and therefore require different DEI actions. Disaggregation of data also allows for intersectional analyses or a multivariate synthesis of multiple identity groups. For example, surfacing insights about the experiences of people with disabilities who are LGBTQIA+ compared to those with disabilities who are not LGBTQIA+.

Center DEI as intrinsic to, versus separate from, the business. Equitable outcomes impact and are impacted by every part of the business, suggesting an interconnection between HR-anchored DEI efforts and DEI efforts focused on products, services, supply chain, community impact, and more. The *Deloitte 2018 Global Human Capital Trends* report introduced the concept of a symphonic C-suite, which entails leaders acting as a symphony of experts playing in harmony instead of a cacophony of experts who sound great alone, but not together. That concept applies here, too. Executives across the organization should be held accountable for championing systemic change and driving accountability in others to achieve equitable outcomes. Many organizations have evolved from having assigned HR leaders solely responsible for DEI, to creating roles such as chief DEI officers who are members of or report to the C-suite. However, accountability for achieving equitable outcomes is not just the responsibility of DEI leaders or HR but *all* leaders across the organization—including members of the C-suite. Addressing systemic inequities requires a commitment to improving equity in all organizational decisions, policies, practices, and actions across spheres.

In applying these new fundamentals, organizations should consider a "glocal" (global-local)

approach.[13] As organizations make the shift to solving inequities, one global DEI strategy will likely not work for every region or country. For example, there are elements of representation such as gender, age, disability status, and sexual orientation that may be relatively consistent worldwide, while other elements, such as race, ethnicity, and religion, as well as regulations, culture, and history vary greatly across geographies. A truly global DEI strategy is not one created by headquarters or the leaders in the most populous country, but one that is globally designed from the outset.

Current experiments: What leading organizations are exploring

- **Google** has been reporting its workforce representation data since 2014, significantly earlier than most other companies.[14] In 2022, Google publishes trend data for workforce representation, hiring, attrition, exits, and self-ID, tech versus non-tech versus leadership roles, by race/ethnicity and by gender—globally and by region. Such depth and specificity allow workers to see themselves in the data and pinpoint areas of strength and opportunity. Importantly, intersectional data for the US workforce—for example, hires of Black women compared to Black men, or attrition for Asian women compared to Asian men—allow even more precision to enable development of solutions to drive equitable outcomes for cohorts that are most underrepresented.[15] Chief diversity officer Melonie Parker, speaking to the power of data, notes, "We are seeing promising progress in the improved attrition for many of our intersectional communities...The data from our Diversity Annual Report also shows us areas where we'll work to do better, and we remain focused on improving hiring and retention for [those specific communities]."[16]

- **Unilever:** UK-based consumer products company Unilever created a disabilities inclusion program informed by comprehensive analysis of the physical accessibility of sites, the accessibility of virtual sites, and recruitment processes. The organization conducted a survey of more than 2,000 employees across Brazil, India, and the United Kingdom, carried out in-depth interviews, and asked individuals to keep a diary of their working environment to inform both root causes and potential solutions. Global guidelines for disability inclusion facilitate accessibility in IT, talent acquisition, communications, and workplace design.[17]

- **Genentech, a member of the Roche Group:** In 2021, nearly all Genentech senior leaders identified specific actions to advance the three strategic pillars of the pharmaceutical company's DEI strategy: foster belonging, advance inclusive research and health equity, and transform society on their own teams. For greater transparency, Officer Action Plans are shared with employees annually. "Awareness among our employees drives accountability and pushes these plans forward," said Emily Reyna, head of Diversity & Inclusion Business Partners.[18]

The path forward

FIGURE 3

Survive. Thrive. Drive.

Survive	**Thrive**	**Drive**
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Set DEI goals and assign them to leaders • Use currently available data as a basis for measurement and reporting • Report on representation, participation rates, and workforce sentiment broadly internally and as is required by local regulators • Designate a full-time DEI leader who is informed about all workforce practices, policies, and processes	• Identify and execute goals based on desired equitable outcomes, with a focus on finding insights and root causes that will directly impact goals and actions • Embed equity goals in the strategy and execution of each talent practice • Launch campaigns such as self-ID (as allowed by local law) to increase data accuracy • Hold all leaders accountable for equitable outcomes (tied to their performance management and compensation) • Identify leading practices to try as experiments, and iterate over time • Release publicly available transparency reports (as transparent as local laws allow)	• View workforce processes as a system to understand equity implications within and across processes • Build trust so workers understand how data will be used, benefits of sharing, and feel safe self-identifying • Shift analysis from historical and current to predictive to determine where the next inequity might occur • Make DEI part of the leadership DNA, exemplifying and actioning DEI priorities on their teams • Provide the DEI leader with investment, influence over work practices, and access to the C-suite

Source: Deloitte analysis.

Looking ahead

Delivering meaningful and equitable outcomes requires a well-crafted DEI strategy and implementation plan that has leadership buy-in and support and that is supported by financial resources and dedicated full-time workers across the organization. Key focus areas include changes to organizational capabilities, operating models, and governance—and transforming the organizational culture.

When measurable progress on equity is not being made, the instinct might be to double down on programmatic DEI. However, sustainable change happens by connecting all internal and external parts of the business across the entire business ecosystem. Organizations should orient themselves toward equitable outcomes and then equip individuals accordingly.

Transparency and clarity around success metrics can enable accountability to internal and external communities affected by inequities and help people within the organization understand what is being done. Sharing the *why* and *how* helps build trust and enhances worker engagement—making everyone in the organization part of the DEI journey.

The new fundamentals of DEI lay a path to bold action in pursuit of more equitable outcomes for all.

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Acknowledgments

Advancing the human element of sustainability

Human sustainability rises to the fore of organizations' sustainability strategies

Coauthored by Karen Cunningham and Laura Richards.

Enterprises' initial efforts to address sustainability issues have been largely driven by public relations or brand defense—with less regard for meaningful outcomes. More recent efforts, such as reducing emissions in operations or manufacturing, are producing real but incremental improvement at the fringes of the business. Now it's time to take the next step to achieve tangible outcomes by focusing on the human element by operationalizing people-enablers in the organization, planning for the right technical and soft or human skills, making work better for humans, and designing for human sustainability. This is where fundamental and lasting change takes root and outcomes can be achieved.

SUSTAINABILITY ISSUES HAVE a real and existential impact on society and the earth, and organizations are often being called on to play a more central role to create meaningful outcomes for people, the planet, and prosperity.[1] Many executives understand the importance and the need to make meaningful change, with nearly 70% of surveyed organizations incorporating more sustainable materials or increasing the efficiency of energy use.[2] However, just funding sustainable "things" will not produce sustainability outcomes.

The cold, hard truth is that many sustainability efforts only dabble at the fringes of the business

and ignore the human element, which is where meaningful and lasting change takes root. For example, many companies have scaled back corporate travel or switched to more sustainable materials, but those actions alone don't hardwire sustainability into the workforce or the work itself, which is the kind of change needed to cultivate a culture of sustainability that could fundamentally shape a company's energy and social impact. Humans are the conduits for material and lasting change.

GLOSSARY OF SUSTAINABILITY TERMS

Sustainability. Meeting the needs of the present without compromising the ability of future generations to meet their own needs. Sustainability includes everything needed for an organization to achieve long-term existence, profitability, and growth. It also includes an ambition to ensure that economic, social, and technological progress occurs in harmony with nature so all human beings can fulfill their potential and enjoy prosperous and fulfilling lives, in dignity and equality, in a healthy environment. "Sustainability" is not synonymous with environmental, social, and governance (ESG), but rather encompasses it.

ESG. The framework that organizations use to monitor and report progress against their sustainability agenda.

- **Environmental.** Tackling environmental costs, long-term climate risks, and challenges related to natural capital through sustainable business practices and supply chain management. Includes careful management of emissions and stewardship of natural resources including water, agriculture, minerals, land, and other materials.

- **Social.** Committing to workforce management practices that advance inclusion, pay equity, health, safety, and well-being, as well as the advancement of human rights, community impact, and societal impact.

- **Governance.** Establishing and executing board and leadership policies and practices on decision-making authority, accountability, and reporting transparency. Includes leadership and governance, shareholder rights, executive incentives, and corporate ethics and behavior.

SIGNALS: THIS TREND APPLIES TO YOU IF...

- Your organization faces rising pressure from workers and other stakeholders for accountability in creating and promoting good jobs, good work, and good platforms[3]

- The communities in which you work are demanding greater transparency about how the organization is creating value in society

- Your regulators and shareholders are requiring more transparent reporting on human, environmental, and societal measures

- Your organization is struggling to measure the ROI of sustainability efforts

The readiness gap

In the Deloitte 2023 Global Human Capital Trends survey, 84% of respondents acknowledge that understanding the impact of sustainability on their organization and defining ownership for driving progress and outcomes is important to their organizations' success. Yet only 21% believe that their organizations are very ready to address such issues.

FIGURE 1

The readiness gap for sustainability

Understanding the impact of sustainability on my organization and defining ownership for driving progress and outcomes is important or very important to my organization's success

84%

My organization is very ready to understand the impact of sustainability on the organization and define ownership for driving progress and outcomes

21%

Source: Deloitte 2023 Global Human Capital Trends survey.

The new fundamentals

Embed sustainability into purpose, strategy, and culture. Sustainability cannot continue to be a siloed ESG, employee health and safety, or corporate social responsibility initiative. Instead, sustainability priorities should be integrated into *how* and *why* organizations operate at all levels throughout the business if they are to experience the behavior change needed to drive tangible outcomes. When asked to identify barriers to achieving sustainability outcomes, Deloitte 2023 Global Human Capital Trends survey respondents overwhelmingly pointed to traditional barriers to change, such as organizational culture, rate of change, funding and resource constraints, and regulations. These identified barriers have in common the externality of control, likely related to

the fact that less than 30% feel empowered to take an ownership role in their organization's sustainability outcomes.

But leaders can shift this thinking by understanding that to make material change, they should make tactical and tangible decisions to weave sustainability into the cultural fabric of the organization and take control of sustainability outcomes. This involves aligning around and telling the narrative of sustainability as a core part of the organization's corporate purpose, putting a supporting organizational structure and operating model in place, and hardwiring the sustainability strategy into business and workforce practices and the work itself. This can be accomplished by aligning incentives, rewards, and performance management to sustainability outcomes.

FIGURE 2

Barriers observed in achieving organizations' sustainability goals

Culture

29%

Lack of funding and resources

27%

External policies and regulations

24%

Rate of change

24%

Leadership commitment and capabilities

23%

Ways of working

22%

Infrastructure and technology

21%

Misalignment of business strategy

16%

Organization structure (including geography)

15%

The work itself

12%

Incentives and rewards

10%

Employer brand/reputation

3%
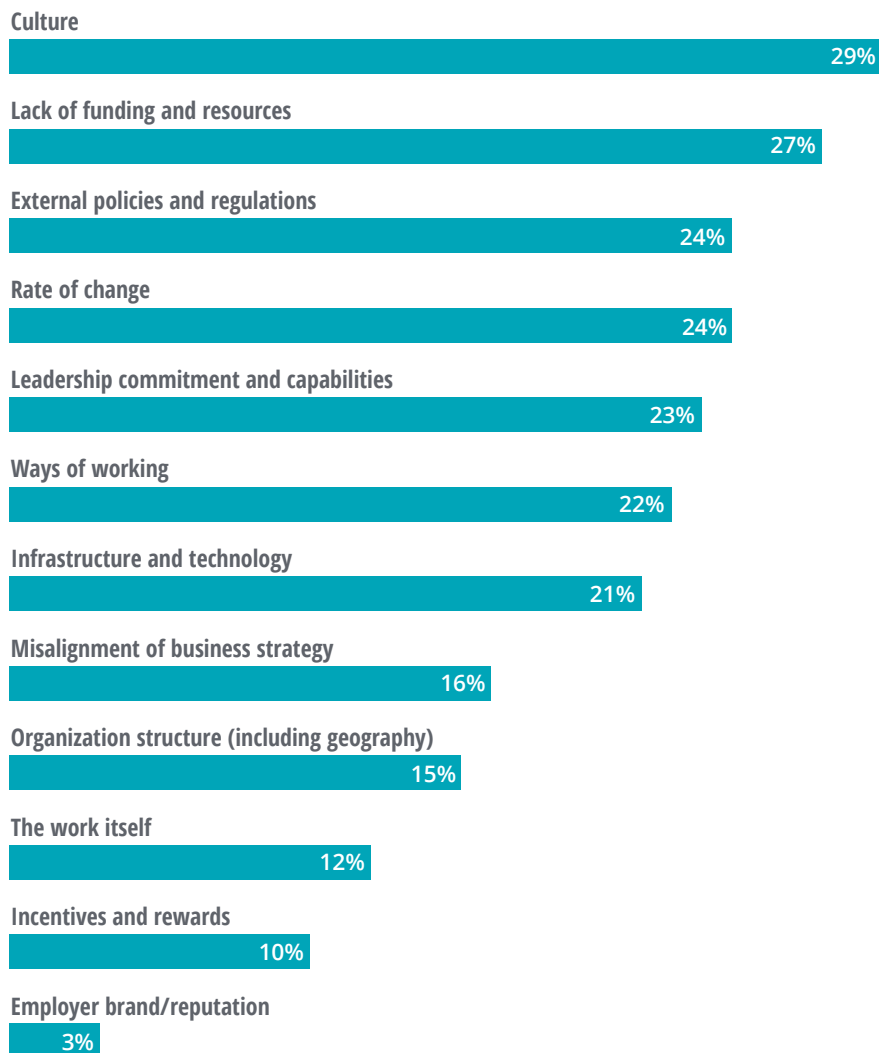
Source: Deloitte 2023 Global Human Capital Trends survey.

Plan strategically for sustainable skills needs. Achieving sustainability outcomes may require the cultivation of new skills, capabilities, and experience within the workforce. An increasing number of organizations seem to be taking note. For example, LinkedIn observed among organizations represented on their platform, significant double-digit growth in organizational demand for skills, such as pollution prevention, environmental policy, and environmental auditing between 2016 and 2022 (57%, 58%, and 67%

growth, respectively).[4] The Deloitte Economics Institute predicts that there will be an increase in 300 million jobs globally by 2050 in order to transition to net-zero.[5] But sustainability skills are both technical *and* human in nature. Organizations will need more than specialized experts with skills in waste reduction or decarbonization. To truly embed sustainability into their way of being, organizations will need to conduct workforce planning in the context of all skills and capabilities needed to operate in a sustainability-forward

culture and future. In addition to the "green" capabilities required, this will involve considering how to instill enduring human capabilities, such as empathy and conceptual thinking, and develop new skills, such as scenario-based decision-making, among workers in the broader ecosystem.

Make work better for humans. In 2021, we wrote about the potential for organizations to design "good jobs" in which job quality is high, workers have a voice, and the organization offers training and skill development.[6] Within the context of sustainability, "good jobs" look more like a holistic approach to work, where the health, safety, and well-being of the worker is prioritized and where work output contributes to sustainability outcomes. For example, sustainable fashion company Everlane regularly evaluates labor conditions, wages, training, and the environmental impact of the factories within its supply chain to ensure worker conditions meet its social responsibility standards.[7] In 2021, the organization reframed its mission statement to adopt a people-first focus on environmental sustainability, promoting both safe environmental practices and safe work environments.

Design for human sustainability. Many organizations have begun to value not only environmental stewardship, but also human sustainability, or the creation of value for current and future workers and, more broadly, human beings and society. These organizations unleash individuals' potential and help them become healthier, more skilled, and more connected to a sense of purpose and belonging. Human sustainability differs from political activism or worker engagement in that the intent is to positively impact the humans and communities who touch an organization, rather than the organization itself. In a global survey conducted by Deloitte in 2022, 64% of workers stated they would be more attracted to, and remain at, an organization that creates value not just for shareholders, but for workers as human beings and

greater society as well. Human sustainability has also moved up steadily higher on the corporate agenda. Seventy-nine percent of business leaders agree that the organization has a responsibility to create value for workers as human beings and society in general.[8]

Our understanding of what it means to create and sustain value is shifting, to the benefit of humans from the board room to the surrounding communities.

Current experiments: What leading organizations are exploring

- **Hilton.** The hospitality company offers one example of how organizations are pursuing both human and organizational sustainability. In response to talent shortages resulting from the pandemic and increased worker agency, Hilton looked for new talent within communities in need of work. The company hired survivors of human trafficking, refugees, and formerly incarcerated individuals, which created value for the workers and society, and simultaneously, the business.[9]

- **Interface Carpet Company.** The global commercial flooring company's journey to carbon neutrality began in the mid-1990s, when Interface leaders put environmental sustainability at the company's core by incorporating it into its design philosophy, performance measures, and culture.[10] The organization's core mission, as stated, is to "restore the health of the planet." This mission has been incorporated into determining what products it designs and how, workers' performance evaluations, and the interactions that drive daily work. The organization has already achieved its goal of carbon neutrality and aspires to become carbon negative by 2040.

- **Apple.** In 2021, the global technology company added a modifier to its bonus structure, which could increase bonuses for executives by 10% should they achieve predefined sustainability goals.[11] The move came after an activist shareholder failed to push through an initial proposal in 2020 but continued to work with Apple executives to implement the change.

- **United States Agency for International Development (USAID).** Through its Green Cities program, the organization collaborates with local governments to increase access to inclusive green jobs, reduce pollution, advance equity, and create net-zero systems in a multitude of communities across the developing world.[12]

- **American International Group (AIG).** The global financial services and insurance company has committed to radical transparency through its sustainability reporting, which accounts for the broader ecosystem.[13] Published annually, AIG's sustainability report includes information on third-party emissions as well as data on the composition of its full workforce. The organization has also created a sustainability-focused framework for underwriting, which incorporates its sustainability values into the largest body of daily work.

- **Anheuser-Busch InBev.** The organization has adopted an ecosystem approach to its sustainability efforts, taking action to help clean the water it sources to produce beer, supporting the financial well-being of farmers whose crops are sourced, and helping make safe beer with indigenous crops for consumption in local communities.[14] The organization's aim is to operate within its ecosystem in a symbiotic manner, growing together with its suppliers, consumers, and communities.

The path forward

FIGURE 3

Survive. Thrive. Drive.

Survive	Thrive	Drive
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Align leaders around the sustainability ambition, vision, and goals and their accountability to outcomes • Strategically communicate to ensure internal (workforce) and external (market) visibility into leadership commitments, progress, and outcomes of sustainability goals • Provide your workforce with sustainability or "green" upskilling opportunities relevant to your industry and organizational strategy • Manage the changes associated with new technology, processes, tools, and ways of working as a result of sustainability investments	• Cocreate your sustainability strategy with members of your ecosystem (workers, partners, customers, suppliers, vendors, etc.) • Rearchitect work to drive environmental sustainability, workforce equity, worker health, safety, and well-being • Evolve your operating model, organization design, job architecture, compensation, and rewards to align with and enable your sustainability strategy and commitments • Pay attention to the jobs most at risk for negative impact on health and well-being • Take a holistic approach to work, in which the health, safety, and well-being of the worker is prioritized, and work output contributes to sustainability outcomes	• Account for shifts in skills and expertise that will enable long-term sustainability capabilities within your workforce planning approach • Design for human sustainability and account for intended and unintended consequences of sustainability decision-making on your workforce, the market, your community, and society

Source: Deloitte analysis.

Looking ahead

Many organizations are facing mounting pressure from governments, global coalitions, their communities, and, not least, their current and future workforce to address sustainability issues. And that workforce is demanding that organizations dispense with the lip service surrounding sustainability in favor of observable outcomes. In the Deloitte Global 2022 Gen Z and Millennial survey, nearly half of respondents said they have personally put pressure on organizations to act on sustainability topics.[14] Thirty percent of workers in a 2021 Deloitte external survey said they would consider switching jobs to work for a company that is more environmentally sustainable.[16] If an organization relies on workers and talent—and what organization doesn't?—it will need to start making meaningful, quantifiable progress quickly. Two essential steps that can help achieve this progress are embedding human sustainability into the organization's sustainability strategy and promoting behavior shifts across the workforce ecosystem that align with sustainability goals.

Setting aside both internal and external stakeholder pressures and wider societal needs, the benefits to businesses for growing their readiness to lead on these issues is clear. In many ways, the problems represented by sustainability serve as a

useful proxy for the entire set of challenges that surfaced throughout the Deloitte 2023 Global Human Capital Trends report. In that light, it should not be surprising that a deeper statistical analysis of the survey data found a clear and predictive relationship between organizational readiness to address challenges of sustainability, inclusion, trust, and purpose and the likelihood of high performance on business and workforce outcomes—the strongest such predictive relationship of any group of items in this year's study.

Regardless of the ultimate benefits, many organizations tend to struggle to prioritize the need for long-term sustainability over short-term financial results. While culture and funding are reported as top barriers, they will also be key enablers to help achieve future success. In an interview with Christine Dacre, the chief financial officer of TransLink, she noted the criticality of applying both a long-term focus and a human lens. She says, "This work takes time and a lot of investment upfront, which can be tough when you don't necessarily see the benefits right away. Moreover, you have to look beyond your company at the whole ecosystem, including suppliers, existing infrastructure, and existing technology. You need a lot of collaboration among stakeholders because no one organization can go at it alone."[17]

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Acknowledgments

Elevating the focus on human risk

Opening the aperture and changing the lens on risks to focus on the human element

Coauthored by Zac Shaw.

As C-suites and boards of directors grapple with contingencies for a growing list of disruptive external risks—including environmental, social, technological, political, and economic issues—they should consider expanding their focus beyond the operational and financial effects of those risks, to include the human implications. It is imperative they understand that the impact of these disruptive risks on humans (both inside and adjacent to organizations) is substantial, as is the linkage between the human impact and that of the organization at large. Seeing these disruptive risks through a human lens paves the way for greater resiliency, enables superior business results, and creates a more effective and informed set of solutions for mitigating—and thriving in the face of—these disruptions.

WHEN IT COMES to human-related risks, organizations and their most senior leaders focus on a narrow set of *workforce* risks—the potential risks that human *workers* pose *to* the business. These risks include operational concerns such as worker turnover, poor efficiency, difficulty acquiring and retaining talent, and compliance with regulations. Typically, their primary focus, if they have a focus at all, has been on the financial and operational impact of these risks. C-suites and boards have only occasionally expanded their focus to include their reputational implications and, more rarely, their human effects.

> "Most boards are not handling human risks as a strategic issue."
>
> — Mike Fucci, board member at Acadia Healthcare and Flotek Industries; retired Deloitte chairman

Yet all risks have a significant human element. Some have an outsized effect *on* humans. Others are affected and driven to some degree *by* humans. As such, we refer to these as *human risks* because they affect humans' professional and personal lives in palpable ways, in addition to the impact they have on your organization's short-term performance, long-term viability, and reputation and brand.

Given the criticality of these human risks, they require the same attention and investments as traditional measures of risks. However, findings from the Deloitte 2023 Global Human Capital Trends survey shows this level of prioritization on human risks is lacking across several dimensions:

- **Environmental.** Climate change and the availability of natural resources could profoundly alter the availability, location, and conditions of work as well as the workforce. According to the Deloitte 2023 Global Human Capital Trends survey, only 18% of respondents believe climate will be a top risk facing their organization in the next 2–4 years. Yet, there are clear signs this will continue to drive where work gets done, how work gets done, and the local availability of workers.

- **Social.** Injustice and inequality don't stop at the workplace door. These social issues can affect how workers feel about work, how they collaborate, and their sense of value and belonging to their organization. According to Deloitte's Global 2022 Gen Z and Millennial Survey, two in five workers have rejected a job or assignment because it did not align with their values around societal and environmental

impact and/or diverse and inclusive cultures. However, only 12% of the Deloitte 2023 Global Human Capital Trends survey respondents believe social and racial injustice will have a substantial impact on the workforce in the next 2–4 years.

- **Technological.** Data privacy and security, virtual work, and automation are vital to the health of a business, but they also shape the experience of getting work done and the types of work available to humans. Yet only 9% of the Deloitte 2023 Global Human Capital Trends survey respondents noted that their organizations believe technology replacing humans is a top risk facing their workforce today. And just 21% believe cyber risks like data privacy and security will have a significant impact on the workforce.

- **Economic.** The impact of income disparities—including access to health care, food, and education—affect the abilities and effort that people bring to their work, yet only 30% of respondents acknowledge the workforce impacts of this risk.

- **Political.** Government regulation and political polarization or conflict profoundly influence the nature of the worker-organization relationship and the relationships workers have with one another, yet only 24% of Deloitte 2023 Global Human Capital Trends survey respondents expect this to have a significant impact on their workforce over the next 2–4 years.

These risks don't occur in a vacuum: Economic risks often drive social ones, environmental risks place different burdens on technology, and so on. The common thread is that all these risks have a distinct human impact. This impact should be addressed not just at the strategy table, but in the everyday lives of the humans throughout the ecosystem who contribute to your business.

The readiness gap

According to the Deloitte 2023 Global Human Capital Trends survey, 81% of respondents acknowledge the importance of anticipating and considering broader societal and environmental risks like political instability and social injustice when making workforce decisions. Yet less than 19% believe their organizations are very ready to address those risks when making workforce decisions.

FIGURE 1

The readiness gap for human risk

Anticipating and considering broader societal and environmental risks when making workforce decisions is important or very important to my organization's success

81%

My organization is very ready to anticipate and consider broader societal and environmental risks when making workforce decisions

19%

Source: Deloitte 2023 Global Human Capital Trends survey.

The current approach to managing workforce risk is insufficient, with only 44% of executives in Deloitte's forthcoming Workforce Risk survey[1] believing that the risk-related metrics their organizations capture give an adequate view of current exposure to workforce risk. That figure falls to 34% when executives are asked to evaluate their preparedness over the next three years.

The new fundamentals

Consider a more expansive set of risks and create a framework for monitoring them. Shifting to a focus on human risks requires a more expansive framework that accounts for the complexity and dynamism of today's world of work. That means moving beyond outdated models that only consider a limited set of internal factors, such as open roles, succession plans, and workforce safety, to account for a broader set of both internal and external human risks. This new framework must look comprehensively at *what* work is performed, *how* work is performed, and *where* work is performed. It must also consider the well-being of the communities in which the organization operates, the well-being of the workforce, and the long-term employability of the workforce—and whether the organization is "future-proofing" workers by helping them acquire transferable skills and capabilities.

Even under today's narrow lens of workforce risk, few organizations are meeting the mark. According to our forthcoming Workforce Risk survey, only 40% of organizations have a clear definition of workforce risk and less than 10% of executives say they are satisfied with how their organization monitors risk. This is especially concerning given the limited set of risk measures today, with few organizations considering expanded metrics like the impact of inclusion (27%) or environmental, social, and governance (ESG) (16%) on the workforce.

Create organizational agility through expanded insights. Human risks don't follow an organization's planning timeline. Instead, they emerge quickly, often catching organizations off-guard and sending leaders scrambling to respond. Beyond determining consistent definitions and instituting a human risk framework, organizations need to enhance business planning and ongoing risk measures to evaluate progress in a more timely manner. Yet only 40% of the organizations surveyed say they are implementing data and analytics to better sense and prepare for emerging human risks. And, only 43% plan to do so within the next 2–4 years.

The ability to generate those analytics depends on an integrated data infrastructure that can ingest expanded human risk factors and provide consumable insights for organizational response. For instance, consider how an enhanced understanding of human risk, including workforce factors and the broader economic, political, technological, social, and environmental landscape, could influence business decision-making. This might include determining where to open a new manufacturing facility, which workforce skilling and benefits programs to offer, or how an organization plans to support workers, redirect

supply chains, or pivot business priorities in the event of a climate or public health emergency.

Even in instances in which the analytics are not predictive, they still increase organizational agility by providing a foundation by which actions can quickly be taken, evaluated, and adjusted in times of disruption. And the insights generated will allow organizations to focus on a broad set of human risk outcomes: financial, operational, regulatory, reputation, and brand.

Instill responsibility at the board-level so it cascades through the organization. The limited emphasis placed on human risk management has traditionally fallen to an organization's chief human resources officer and on occasion, its chief financial officer. Even simple knowledge or understanding of workforce-related risk appears to be limited outside the human resources department.

> "The most ineffective way to approach human risks is to say this is an HR-only issue."
>
> — Mike Fucci, board member at Acadia Healthcare, Flotek Industries; retired Deloitte chairman

According to Deloitte's Workforce Risk survey, only 40% of board members have expert-level knowledge of workforce-related risks. Today's global disruptive risks can have a material effect on a company's long-term viability and need to be fully understood by all executives, but particularly by board members. Boards should embrace responsibility for human risks head-on in service of the investor and stakeholder needs of today and tomorrow, which requires more than just creating or expanding existing subcommittees to take ownership.

Accountability cannot end with the board. Instead, it must cascade through the organization so that monitoring and preparing for human risks becomes a way of operating. And yet, only 39% of our Workforce Risk survey respondents noted that line managers have expert-level knowledge of workforce-related risks. These line managers are often closest to and most in tune with worker sentiment on the ground. Creating human connection among workers and with the organization can help preempt human risks, just as neighbors feel shared accountability to look out for their street. As discussed elsewhere in this report, continuous dialogue between the organization and its workers is a critical component to engage and activate the workforce when it comes to human risk.

Current experiments: What leading organizations are exploring

- **Gard.** The Norway-based global insurance provider actively conducts scenario planning around potential risks, including those posed to the workforce. The company identifies a broad list of potential risks related to socioeconomics, environment, geopolitics, and technology, and then asks both the board and managers which they believe are most likely. Gard then conducts scenario planning around these risks with cross-functional working groups to identify potential solutions.[2]

- **MetLife.** The global insurance provider places responsibility for ESG risks with the board and they meet with executives regularly to review data to evaluate climate risks. The organization is currently developing the ability to stress test and conduct scenario planning around climate change.[3]

- **US Department of the Treasury.** The Bureau of the Fiscal Service has started to take a more expansive view of the risks it evaluates including workforce risks, which are now part of its enterprise risk framework. The agency also plans to advance its data and analytics capabilities to further support evaluation of and decision-making around risks.[4]

The path forward

FIGURE 2

Survive. Thrive. Drive.

Survive	**Thrive**	**Drive**
Remain viable in the marketplace	*Differentiate to gain competitive advantage*	*Lead the market by radically innovating and transforming*
• Expand the criteria that you use to evaluate risks to include the human impacts along with financial and brand risks • Ensure your holistic workforce is included when evaluating the human impact • Collect data regularly to inform your decisions around high priority human risks as part of your periodic business planning efforts • Create more transparency in communicating human risks and mitigating actions to your workforce	• Designate roles and/or teams across your workforce ecosystem to focus on sensing, scenario modeling, and risk preparation • Consider current and emerging human risks when defining your business and workforce strategies • Instill accountability for preparing for human risks at the board and executive level	• Identify the behaviors that drive human risks and create incentives and a culture of shared accountability to change those behaviors • Use advanced data and analytics to sense patterns, predict risks, and drive planning and preparedness both inside and outside your organization • Share your approaches and insights with other organizations, communities, and regulatory bodies to advocate for and benefit all humans in society

Source: Deloitte analysis.

Looking ahead

A human-centered, predictive approach to managing risk requires a significant mindset shift for leaders and workers alike—as well as an additional investment. However, the dangers of sticking with the *status quo* far outweigh the costs of improvement. Executives who do not prioritize a broader, more human-centric approach to risk management could find themselves at odds with board members, and other influential stakeholders, who are increasingly interested in how human risks are managed.

While the board ultimately needs to be accountable, it will take your entire workforce to effectively care for human risks. Many human risks are caused by "wicked problems" in that they are complex, dynamic, and seemingly intractable social challenges.[5] The same kind of ecosystem thinking that informs business strategies can be brought to bear on its human risks, pulling on the talents and resources of workers, executives, and the communities in which they operate to cocreate solutions.

Leading organizations continue to expand their sensing capabilities and collaborate with workers to predict and plan for all forms of human risk. Those that don't may soon find themselves outpaced and overwhelmed by emerging challenges and disruptive risks—and unable to react effectively, much less capitalize on new opportunities. Continuing to apply a traditional business-centered perspective to risk management may signal to workers, and even customers, that the organization does not prioritize workers, which can ultimately adversely affect the organization's financial and operational performance, reputation, and brand.

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Acknowledgments

Leading in a boundaryless world
Reshaping the way you lead and influence others

How do you lead in a boundaryless world in which work is no longer defined by jobs, the workplace isn't a specific place, many of the most important workers aren't traditional employees, and leadership isn't determined by the organization chart? To thrive, leaders must evolve in tandem with their organizations and adopt a new set of fundamentals to mobilize workers and teams against new outcomes.

Dear leaders,

Your organization is facing a pivotal reframing moment, and you are too, as business and societal shifts are changing the trajectory of organizations' human agendas to thrive in an age of discontinuity.

We are leaving behind a simpler, more compartmentalized world and moving into a boundaryless one. As such, both the definition of a leader and the work of leading have changed.

FIVE DISCONTINUITIES AHEAD[1]

- Radical science and technology: The next wave of exponential progress

- Shift to stakeholder capitalism: The inevitable internalization of "externalities"

- Globalization reinvented and active governments return

- Decline of "the theory of the firm" and rise of "the theory of the ecosystem": A new strategic unit of analysis

- Rise of networked power: Power default is switching from hierarchies to networks

Leadership is no longer contingent on position, hierarchy, or number of direct reports. Leaders today can be anyone who mobilizes workers to get work done, and that remains true whether those individuals have or don't have formal reporting relationships and whether those individuals sit inside or outside the organization.

As a leader, the proven ways in which you have operated your organization are in question—as are the tried-and-true management techniques on which you have come to rely. In fact, Deloitte 2023 Global Human Capital Trends survey respondents consistently ranked leadership among the top five barriers for seven of the nine trends we explored. The opportunity presented by this moment to lead in new ways is enormous.

ELEVATED EXPECTATIONS FOR THE C-SUITE

Today's expanded definition of leadership means that individuals at all levels are mobilizing against the new opportunities that the boundaryless world presents. The key consideration for C-suite executives is how to harness this energy in ways that advance shared organizational goals without stifling innovation and agility at the team level.

Doing so will require a more symphonic C-suite than ever before,[2] operating in harmony to inspire their organizations against new measures of success and holding leaders at all levels accountable to that shared vision. Only C-suites that work as a team will be able to achieve the level of vulnerability required to thrive in the boundaryless world. That includes vulnerability to be willing to experiment, test, and fail, and vulnerability to operate with a greater level of transparency and empathy than ever before.

In May 2020, amidst the COVID-19 pandemic that was putting immense pressure on the organization, AdventHealth CEO Terry Shaw took key members of his executive team to an offsite location to discuss the future of their organization. At the advice of his executive coach, the leaders focused on two areas: 1) what the pandemic taught them about their organization and what they as leaders would carry forward, and 2) how the organization needed to change and adapt to come out of the pandemic ready for the next set of disruptions the marketplace could bring.

"The pandemic wasn't over, but we spent two weeks designing a lot of things for our future that are now either already installed or being installed."

—- Terry Shaw, president and CEO, AdventHealth

"It changed the trajectory of our organization and impacted the focus that we had in ensuring that we future-proof our company beyond dealing with the pandemic of that moment."

—- Olesea Azevedo, chief people officer, AdventHealth

The fundamentals around *where* you show up and how *you* show up, or the mindset you adopt to drive work forward, have changed. In a world where leaders exist at all levels, you must become an orchestrator. This entails cocreating value with your workers and teams, rallying people around an idea, and building influence. Those who are successful will do this to the benefit of the organization, the workforce, and society at large.

"At all levels, we need to lead in ways that help the whole boat go faster. To do this, we focus relentlessly on transparency. For our enterprise leaders, this means that their job is not to make decisions for people, but to ask really good questions and empower their teams to make the decisions themselves. There is also transparency and accountability for outcomes versus outputs including celebrating successes openly and asking, 'What can we learn from that?,' when things don't go well. This leads to better outcomes in the future."

— Neil Walker-Neveras, chief talent officer, M&T Bank

Your influence has never been more needed. Your role has never been harder.

The leadership gap

The Deloitte 2023 Global Human Capital Trends survey respondents told us that leadership is more important than ever and increasingly difficult to find. Ninety-four percent of respondents believe leadership capabilities and effectiveness are important or very important to their organization's success, representing the highest importance score across all trends. Yet only 23% believe their organization's leaders currently have the capabilities necessary to manage in a disrupted, boundaryless world (figure 1).

The lack of readiness may be due to a misunderstanding of the implications of and opportunities within the new world we're entering. For example, fewer than 15% of respondents believe their organizations have leaders who are very ready to inclusively lead an expanding workforce—or to consider broader societal and environmental risks when making decisions. Only 16% believe their leaders are very ready to use technology to improve outcomes and team performance, and only 18% believe their leaders are very ready to develop the right workplace model for their organization.

FIGURE 1

The readiness gap for leading in a disrupted world

Leadership capabilities and effectiveness in a disrupted world are important or very important to my organization's success

94%

Leaders in my organization are very ready to lead effectively in a disrupted world

23%

Source: Deloitte 2023 Global Human Capital Trends survey.

Reimagining leadership

The growing leadership gap is likely not due to a lack of skills or competence. Instead, it's more apt to be the result of looking at work and workers through yesterday's lens—based on yesterday's definitions and boundaries. In a boundaryless world, leadership is less about formal authority and hierarchy and more about insight, personal accountability, connection to values, and action. This means you'll need to activate your teams and your workplace in different ways, requiring you to challenge your assumptions about what the organization is, who is in it, and how it works.

But where to begin? Nearly half of the survey respondents say their organization's leaders are struggling to identify what to prioritize because they are overwhelmed by the number and frequency of disruptive shifts occurring. On that count, the new fundamentals you'll need to adopt as a leader are similar to the changes your organization will need to make.

The new fundamentals

Framing the challenge: Think like a researcher. In the past, you were a successful leader because of your ability to come up with the right answer or solution—execution then being a matter of making sure your workers did their jobs in operationalizing that solution. In a boundaryless world, your success will be less dependent on defining the solution and more dependent on creating an environment and mobilizing workers to experiment and adapt, quickly absorbing and learning from new information. As such, a new measure of success as a leader will be a shift from managing *jobs and activities* to orchestrating *outcomes*.

Respondents from the Deloitte 2023 Global Human Capital Trends survey agree this mental shift toward outcomes over outputs is needed. Thirty-three percent of respondents cited lack of accountability for outcomes as a barrier to leaders' ability to drive value for the organization. Managing and driving toward outcomes will require constant experimentation and learning—and strong capabilities for finding and using data to inform decisions. There must also be greater comfort with making mistakes and challenging legacy orthodoxies. Survey respondents anticipate that in the next 2–4 years, leaders' ability to challenge the status quo and drive new ways of working will be one of the most important roles they play in the organization. To be an effective leader in a boundaryless world, you will likely need to move faster than your organization. Start by

focusing your attention and teams on outcomes and creating space for experimentation (and learning from mistakes).

Charting a new path: Cocreate the relationship. It used to be that a handful of executives were the primary drivers of much of your organization's success, enabled by the workers inside the four walls of the organization. Your power and agency directly correlated with your job level. But in a boundaryless workforce ecosystem, where workers have greater agency than ever before, problem solving is a team sport—and the best solutions are cocreated. Yet 34% of survey respondents say their organization's leaders are not at all ready to lead in a world where solutions are cocreated. This cocreation-readiness gap is larger than the gaps that exist in the other new fundamentals.

Leaders may view cocreation as a challenge to their hierarchical authority—and perhaps even a personal failure in not being able to solve problems entirely on their own. These are conclusions drawn based on old boundaries. Cocreation must be viewed as an opportunity for leaders to tap into the full knowledge and experience of workers in your organization's ecosystem, resulting in better solutions. On a personal level, it helps expand your network of influence across the organization.

With cocreation, how you build relationships—and who you build them with—matters more than ever. To achieve the expected results, you'll need to intentionally invest in building relationships with all types of workers in your organization, including those outside, inside, upwards, and down. You'll also need to actively cultivate a more intimate knowledge of the workers with whom you build those relationships. This might include their expertise, potential, dreams, and needs. In an expanded ecosystem, influence is not granted, it's earned by giving others agency, ownership, information access, and a path to achieving their own personal aspirations.

Designing for impact: Prioritize human outcomes. In business, an organization's financial and operational metrics such as revenue generated, costs reduced, and market share captured have been the traditional measures of a leader's success. But in a boundaryless world, outcomes broader to the organization are joining that list. Every choice that you and your organization make has consequences. No individual or organization can escape the impact of each other's actions and decisions. For example, as an organization, you could choose to ignore political conflict, but this decision in and of itself is a choice—one that could potentially cause customers and workers to disengage or lose trust.

To thrive in this boundaryless world where everything is connected, leaders must put humans at the center of everything they do—designing for meaningful outcomes that benefit both the organization and the humans it touches. This starts with having genuine care for the people that you lead and replicating that in your actions inside and outside of work. This goes beyond empathy: You must demonstrate genuine care and concern for the people you lead in their work and their lives to build meaningful connections and outcomes.

This mindset shift will likely be very challenging since few leaders are currently held accountable for driving human-centered solutions to human-centered challenges. For example, more than 40% of survey respondents said their business function currently has no role in measuring sustainability outcomes. As such, success—at least for the time being—might mean holding yourself to higher standards than your organization itself currently does.

The good news is that playing a positive role in society doesn't need to be at the cost of financial outcomes. Businesses that make a genuine commitment to socially responsible action outperform the market.[3]

The choice in front of you

Leader, this is your opportunity. You can take advantage of this lack of boundaries to reframe your role in creating the future of your organization, assuming personal accountability for charting a more human course forward.

Or you can choose the alternative: Accept the chaos that may come as boundaries fall away and do what is minimally necessary to survive with the hope that you will weather the storm. However, you will have to do so without the tether of the numerous and dated bedrock assumptions about work and workers.

Although the potential for disruption is real, so is the opportunity for an extraordinary reimagination of what the work, workforce, and workplace can be. Should you choose this bold path and commit yourself and your organization to driving toward a new future, we recommend that you:

- Use experimentation to inform better solutions, foster learning, and accelerate value.

- Cultivate deep and intimate relationships with the workers across your broader ecosystem through cocreation.

- Widen the aperture of your decision-making to understand its full impacts with the human agenda in mind.

Agility will be one of the defining characteristics of the decade to come. Embrace the possibilities the boundaryless world can create for you as a leader, for your organization, and for society at large as we build a more equitable and human future.

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