Deloitte.

Delve deeper into
changing organisational
culture and mindset
Learnings from COVID-19

Contents

Executive summary

COVID-19 has had an unprecedented impact on organisations globally. No sector has remained unaffected. The lockdown, social distancing norms, work from home policies, and restrictions on public gathering have disrupted both demand and supply. Although governments across the world have started easing restrictions and allowed limited movement of people[1] , new infection cases continue to emerge. According to the World Health Organization, COVID-19 will never go away and become a fact of life.[2] Organisations are realising that living with restrictions on mobility of people and remote working (by a majority of employees), amongst others, are likely to become the new normal, instead of an aberration.

In 2015, Deloitte has partnered with MIT Sloan to conduct an in-depth study on digital organisations across the globe and know what differentiates them from traditional organisations. Digital organisations are usually found to be faster, more flexible and distributed, and have a different culture and mindset than traditional businesses.[6] Based on these studies, we believe that organisations exhibiting the traits of a digitally mature organisation have been able to respond to the disruption caused by COVID-19 more effectively. Furthermore, the crisis has accelerated organisations' digital transformation journey; now more organisations believe that the digital way of working is necessary for business continuity in the future. This has increased the need to focus on building the right culture and mindset to support the digital transformation.

To test these hypotheses, we conducted a study across a group of 39 organisations in India. The group comprised a mix of Indian organisations and multinational companies (MNCs), from different sectors. We interviewed their C-suite members to understand how these organisations are responding to the crisis, and the impact of culture and mindset on driving transformations. We also explored how leaders in these organisations have responded to the crisis and embraced innovation to address these challenges.

We hope that insights from these conversations will help leaders understand what defines digital culture, its importance in ensuring business success,

and how to drive it within their organisations. The following are the key findings of the study:

01. Lead performance indicators, such as employee productivity and innovation, saw an upward trend during COVID-19
The COVID-19 crisis created significant challenges for the business as 57 percent organisations reported a decline in business performance. Barring sectors catering to essential products and services, most companies reported a decline in business revenues. At the same time, however, companies witnessed little or positive impact on employee productivity. About 74 percent organisations reported maintaining or even increasing employee productivity during the lockdown. Innovation and speed of implementing ideas picked pace. We learnt inspiring tales of innovative ideas being implemented across organisations to solve problems and meet customer demands. More than 60 percent organisations saw higher innovation levels.

02. Crisis brought out the best in organisations
While the business scenario was grim, there were stories of how these difficult times brought out the best in organisations. When pushed into a corner, organisations anchored themselves around their purpose to serve their customers and employees. Agility and speed of decision-making drove new ways of working. Collaboration across different quarters happened seamlessly, norms of hierarchy were questioned, and flexibility in decision-making became important. The organisations surveyed have displayed at least one or more of these cultural characteristics during the COVID-19 crisis.

03. Culture has direct impact on performance
Organisations that embraced the right culture characteristics experienced a certain vibrancy and energy across the board. This helped them deal with the disruption. We call these culture characteristics "digital DNA" (refer to the section on "Differentiating through culture markers"). We found a strong correlation between digital cultural DNA and performance. Of the 44 percent organisations performing better or at the same level as before, more than 70 percent

had a high prevalence of five of the six cultural markers. The most prevalent markers observed were collaboration (observed in 100 percent respondents), customer centricity (observed in 88 percent respondents), and clear purpose (observed in 82 percent respondents).

04. Companies higher on digital culture maturity curve found it relatively easier to adapt to the COVID-19 situation

Organisations did not adapt to the above-mentioned characteristics overnight. Some of these aspects were already a part of the way of working of these organisations. Companies that were already high on the digital culture maturity curve found it easier to adapt to the COVID-19 reality. About 82 percent organisations reporting better or same level of performance stated that strong cultural DNA (high position on the digital maturity curve) helped them respond better to the crisis.

05. Mission and alignment to purpose became key drivers of organisational effectiveness

Organisations reported that the focus on purpose and values is crucial during a crisis. About 85 percent organisations stated that during a crisis, they prioritised their actions and took decisions in line with their mission.

06. Crisis pushed organisations to respond with agility and embrace a culture of experimentation

Organisations experienced a mindset shift as they realised that old rules no longer work. Speed of decision-making accelerated significantly, leading to faster problem solving and better response times. Experimentation and risk taking also increased in the absence of any guidelines to deal with the new situation. An overwhelming 85 percent of the respondents agreed that they explored new opportunities and pushed their boundaries during the crisis.

07. Most organisations witnessed an immediate acceleration in collaboration to solve problems

Leaders rallied behind the organisational cause, resulting in a reduction in conflicts. Senior leaders became more cohesive as they worked collectively to find creative solutions to deal with the situation. About 92 percent organisations reported improved collaboration during the crisis.

08. The crisis was a test of leadership, and leaders upped their game through increased communication, empathy , agility, and empowerment

The crisis posed enormous challenges for leaders as they navigated their way through uncertainty. Leaders faced unusual dilemmas and challenges, pushing them to up their game. They increased communication with teams on both the business and personal fronts. They led with empathy and strength. They set direction for their teams amidst uncertainty and role-modelled resilience. **Our earlier paper on 'Leadership in the times of crisis'[3]** further talks about five fundamental themes of resilient leadership during the COVID-19 crisis that constitute effective leadership behaviour.

09. Empathy was manifested in a way never seen before

One of the most fundamental asks from leaders has been to act from their "heart". As the pandemic started to make its presence felt, we saw leaders recognising the human side of the upheaval and empathising with people. Concerns about employee health, safety, and well-being became a key priority for leaders. About 72 percent organisations reported adopting a largely humane approach to deal with the crisis.

10. Driving a digital mindset and culture, and moving towards being digital

As organisations are gradually moving to the recovery and thrive phase of the COVID-19 situation, driving agility and innovation becomes an important agenda for organisations. About 51 percent organisations placed these aspects amongst their top three priorities in the next 6-12 months. Although ambiguity is likely to persist, constant innovation to adapt to the new normal will be critical from a business standpoint. A culture and leader mindset fostering agility, collaboration, and innovation, is expected to be a key imperative for the C-suite.

Insights from industry leaders

Business impact – The interplay of revenues, productivity, and innovation

01. The impact on business performance has been apparent and most organisations reported a decrease in revenues
About 57 percent organisations reported a decline in business performance. Presence of an existing product/service portfolio has been vital for organisations to ascertain the extent of the impact. Organisations that cater to essential services and those who quickly modified their products/offerings to meet the evolving customer needs have witnessed a surge in demand. However, demand for non-essentials and discretionary spend have significantly declined, mainly due to factors such as disruptions caused by lockdown, supply chain challenges, and an overall decrease in demand.

02. The acceptance of innovative ideas and the speed of implementing them increased
We heard of innumerable examples of innovative ideas being implemented to solve problems and meet customer demands. About **62 percent organisations shared instances where employees had resolved customer-related/external issues in a non-traditional manner.** Interestingly **74 percent organisations also shared a similar sentiment when it came to innovations in internal processes.**

Common examples included repurposing existing infrastructure, creating new products that are relevant in the current time, and exploring partnerships with non-traditional players. Organisations reported multiple examples of incremental process innovations. Sales force of a leading fast moving consumer goods (FMCG) organisation, for example, transitioned from meeting vendors and clients in-person to virtually connecting with them through Zoom, WhatsApp, or call to understand market demand and product mix. Several FMCG organisations reported instances where employees, retailers, or distributors used their own vehicles to pick up and drop goods, and ensured supply despite restricted mobility. Organisations also started exploring partnerships with non-traditional ventures, such as online delivery partners and transport aggregators, to get their products to the market.

Many organisations have also repurposed existing resources, infrastructure and employees, to provide products and services that are currently in high demand. For example, a major Indian conglomerate converted

**Business performance – Pre vs post lockdown***
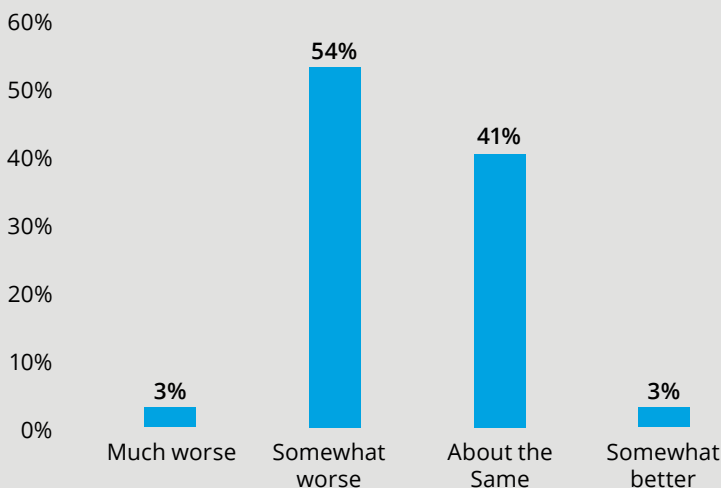
* Percentages do not total 100 due to rounding.

its chemical agro factories to manufacture sanitisers, and repurposed its resorts as quarantine centres. An FMCG organisation dealing in essential goods experienced a multi-fold increase in demand for certain product categories. It immediately increased manufacturing, created new packs, and converted its existing production lines into lines for products in demand – all of this required innovation. At the other end of the spectrum, a multinational bank's global in-house (GIC) centre reskilled employees in technology and new functions to pick up a more business-oriented activity of processing emergency COVID-19 loans mandated by the government.

A leading conglomerate converted its hair-extension manufacturing factory into face masks and personal protective equipment production unit as they realised that this was the only set up that has sewing facilities. The conversion took less than 90 hours, which is nothing compared with what it could have been in the pre-COVID-19 situation. A leading fabric and fashion retailer introduced new products, such as hand sanitisers and floor cleaners, to respond to the market demand, while demand for their core product portfolio came at a standstill. Another leading FMCG player introduced new products, such as surface disinfectants. A technology company providing virtual collaboration solutions, swung into action and put together offers to customers, including multiple state governments, to coordinate COVID-19 strategies using its products. Through this move, it has started expanding its role from being a vendor to a partner.

We saw limited examples of large-scale innovation and transformation. Only a few organisations are thinking longer term and hustling to find opportunities that can create long-term strategic advantage. A leading technology organisation's chief human resource officer (CHRO) said that quite a few organisations have been unable to find opportunities in this time of disruption. The CHRO also said that this is the time to think "out of the box". Some conversations leaned towards the thought that organisations need to encourage and embrace a future-oriented approach, focusing on not just how to optimise for today but also on how to create value tomorrow.

**Organisations' ability to innovate in the current crisis**
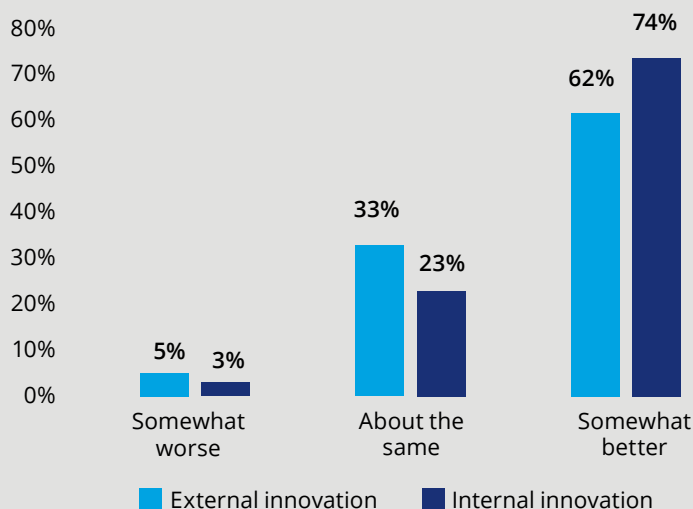
03. **Most organisations either saw an increase or no change in employee productivity**
Interestingly, during the same period, **15 percent organisations witnessed an overall increase and 59 percent reported no change in employee productivity.** This has been attributed to various factors, such as flexible work hours, a reduction in commuting time, and the ability to connect online. An Indian FMCG's CHRO expressed that the "scheduling and planning of meetings has become easier, and people have started respecting each other's time. People come prepared to meetings with their agenda and work has become more efficient". However, this increase in productivity comes with its own set of challenges. Many leaders mentioned that employee productivity levels varied. In some sectors, the productivity levels saw a decline due to 1) the nature of jobs, 2) the expectation to work 24x7, 3) unavailability of a conducive work environment at home, and 4) lack of infrastructure and equipment, such as laptops and proper connectivity.

One of the leaders mentioned, "employees in roles such as talent acquisition and marketing are being under-utilised". A leading GIC's leaders mentioned that in the initial days of the lockdown, the employee productivity was significantly affected as the organisation took time to provide the necessary infrastructure. However, in due course, employees have become more comfortable with the idea of working remotely and productivity has improved.

This has been especially evident in companies who already had the policies and infrastructure to support work from home or were quick to set the required systems in place. The rise in productivity can be attributed to saving of hours spent on commuting and efficiency of virtual meetings with flexibility in timing and fixed agendas.

Impact of remote working on employee productivity
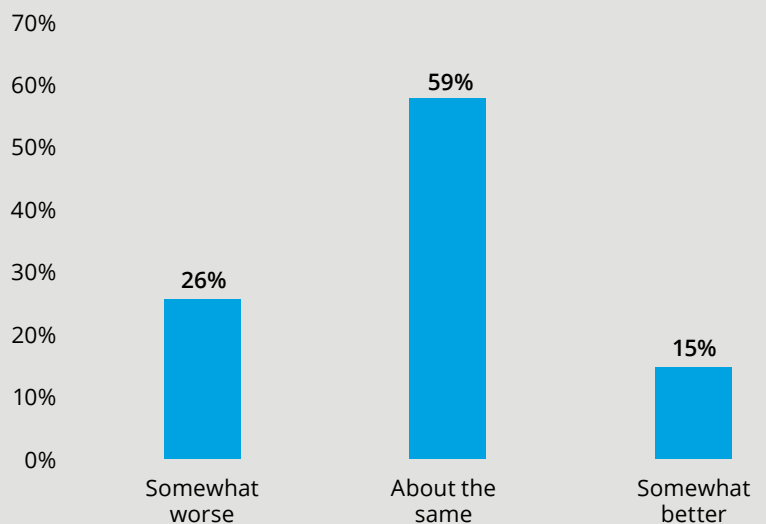
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CHRO, An Indian FMCG

Culture at the helm of the COVID-19 journey

04. **Almost all organisations saw the origination of a common purpose – be it customer centricity or employee focus**

COVID-19 reminded us that people are motivated to the highest levels when they can connect their work contributions to a greater purpose and mission. For instance, how workers at some consumer product companies have found meaning and inspiration in their jobs as their companies increased production (or in some cases, pivoted to start developing) of disinfectants and sanitisers. People wanted to contribute to their organisations when they understood how their unique talents and strengths have an impact on a larger goal.

About 85 percent leaders mentioned how the purpose made it easier for them to collaborate and take quick decisions by removing complexities associated with the decision-making process. Almost all the organisations shared instances where during these times, teams were united by a common purpose, differences in opinion on matters unrelated to that purpose became less relevant, and differences in opinion in how to achieve that purpose became prevalent. This alignment can be the difference between staying focused on what matters and veering off the course.

Interestingly, this core purpose not only brought together the organisation but also its ecosystems of vendors, partners, etc. They work together to use their collective and complementary capabilities to effect a meaningful change.

This sentiment echoed in our conversation with a global food and beverage organisation. Its passion and guiding principle is to 'help customers have access to their choice of product', driving behaviour of each employee. He mentioned that employees (not from sales) in many housing societies have started playing the role of sales representatives, and become single point of contacts to sell products to customers in their areas. They started tracking demand and ensured products' delivery in their respective areas.

We put everything aside and our single focus was on – how do we help the employees? Also for us, customers are like employees, and the entire set of employees went out of their way to help the customers. Every employee made the client his or her top priority. They were empathetic and went outside their normal ambit to serve the customers

CHRO, Leading Service Firm

A major global pharmaceutical manufacturer's CHRO mentioned that during this crisis, the organisation is trying to make a positive impact on the four stakeholders – customers, employees, community, and shareholders. The organisation's commitment to this credo goes beyond stated communication of behaviour. It also makes decisions that create the maximum impact on the stakeholders. For them, it is an 'and' situation, not an 'or'.

Organisation provided clarity on purpose*
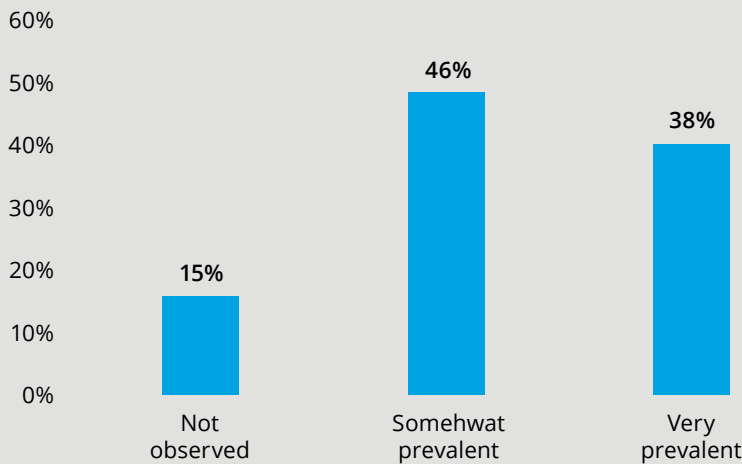
* Percentages do not total 100 due to rounding.

05. Crisis led organisations to respond quickly and let go of the fear of failure

Organisations are realising that rules have changed and agility is the way to work in the future. The majority of the respondents agreed that they pushed boundaries during the crisis and explored new opportunities. A leading private equity firm's CHRO witnessed a change in mindset during the pandemic. He mentioned that across its portfolio of companies, he observed an accelerated pace of change. The paradigm changed overnight as the organisation realised that everything has to move online. The pace of adoption of other digital solutions has also increased.

The speed of making decisions accelerated significantly. A leading FMCG player shared that decisions were made on the fly. To solve problems, it converged a set of people around a problem statement, irrespective of their hierarchy, to take immediate decisions. Another FMCG player shared that its response time decreased. It had cross-functional meetings every day, leading to quick decisions. A leading branded fabric retailer's CHRO shared that

this period was the best he saw in terms of speed and agility. It engaged into intense deliberations, action planning, and customer connects to ensure that the business does not suffer any losses after the lockdown is lifted.

Rapid innovation became critical especially for companies whose products or services were relevant during the crisis. A leading technology company, along with its partners, found innovative ways to use existing technology and come up with new products. These products helped customers around social distancing issues and the process of employees returning to office. An Indian conglomerate's CHRO shared that it experienced collaboration, rapid decision-making, and a whole lot of flexibility. It learnt to experiment and try something new. Another Indian conglomerate's CHRO said that during the COVID-19 situation, tolerance for failure increased significantly. This contributed to an increase in experimenting and risk taking. A large part of this change was attributed to the feeling that the situation is grim and uncertain. The focus was on making efforts, rather than worrying about results. "If it works, great and if not, nothing much is lost", said one of the leaders. We learnt stories where actions were embraced and mistakes were not punished.

Organisations' willingness to take risk and explore new opportunities*
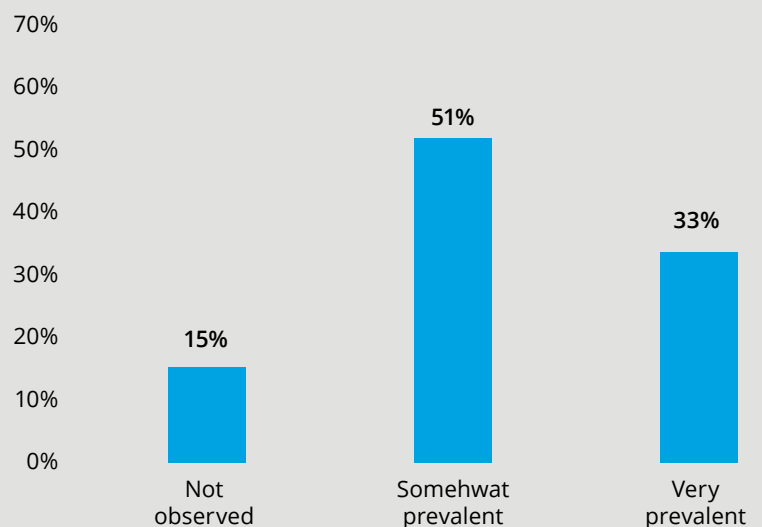
* Percentages do not total 100 due to rounding.

06. Most organisations witnessed an immediate acceleration in collaboration to solve problems

About 74 percent organisations reported significant collaboration during the lockdown. For example, a leading FMCG company spoke about having daily cross-functional meetings between the sales, supply chain, HR, finance, and other functions, leading faster response time and improved productivity. A major difference the company experienced was that conflicts disappeared. Earlier teams came together from a functional perspective; now they collaborate with an aim to find a solution and make things happen. Another FMCG leader reported that its senior leadership team became more cohesive. With everything being thoroughly debated, the decision-making process becomes more transparent. The single-minded focus on customers helped improve collaboration at work. Companies in the FMCG sector that continued to operate during the lockdown saw greater collaboration because they needed to continue supply essentials despite constraints. The overarching commitment of ensuring products reach customers on time led people to work cohesively to resolve issues faster.

Collaboration also increased because the need to learn from each other became more pronounced. Everyone was learning along the way – from adjusting business continuity plans (that had not envisaged such a crisis) and figuring out ways to engage teams during lockdown, to sustaining business. Multiple forums were established both within and across organisations to share learnings and insights, and equip leaders to deal with the crisis more effectively.

07. Most organisations reported an increase in flexibility in work policies to focus on what is most critical

The willingness to embrace flexible ways of working has also increased and people start believing that this may become the new "normal". The disruptive situation pushed leaders to be flexible in crafting policies related to work. For example, a leading FMCG company acknowledged 'loosening up on things'. It allowed company assets to be taken home, which under normal circumstances would not be considered. It also felt that the magnitude of the problem was much more serious than the policies. Another FMCG company stated that for the moment it is being flexible on the performance management process. A leading medical supplies company has asked employees to de-prioritise areas of work that have lost sheen during the COVID-19 crisis. It is encouraging employees to reflect deeper and consolidate their thinking on goals for the year.

New practices of resource sharing are emerging. A leading bank's global centre in India realised that its efforts and support are now being required in managing initiatives. As the situation calls for all hands on deck, teams reprioritised their tasks and resources were shared to support business critical initiatives. Another global electronics company saw this flexibility emerging in redeploying people. It quickly introduced a practice where a manager can loan under-utilised team members to a new manager without any change in the reporting line.

Organisations have accelerated their efforts to adapt to the "future of workplace". About 77 percent organisations, even the more traditional ones, have adopted technology quite well and use it to connect, communicate, and conduct business.

Organisations with intentional collaboration
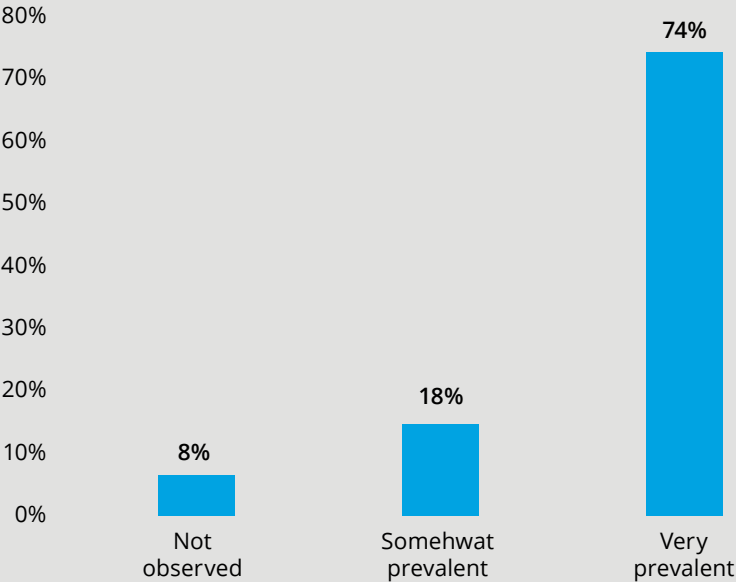
Organisations using technology

70%	
60%	
50%	
40%	41%
36%	
30%	
23%	

Not observed — 23%
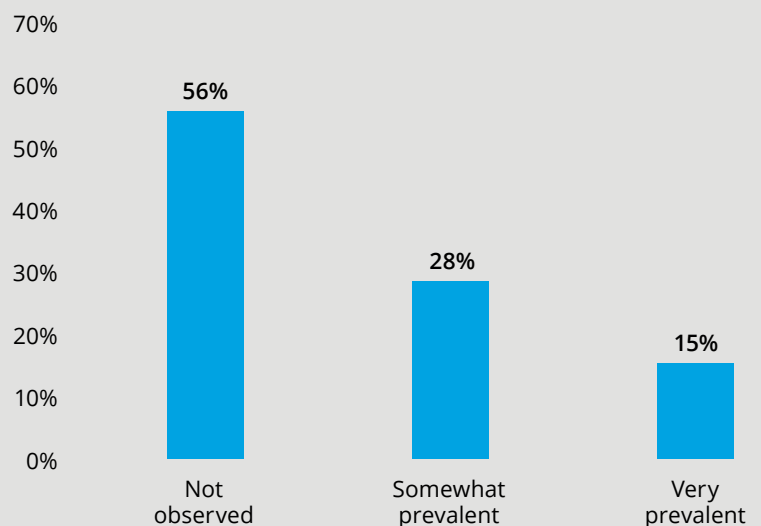Somewhat prevalent — 36%
Very prevalent — 41%

08. The crisis saw hierarchy loosening up – Decision-making was percolated down the structure and employees at the front line are being increasingly empowered

The COVID-19 crisis has also led to loosening up of hierarchy a bit. In quite a few conversations, we heard examples of organisations allowing employees at the front line to take decisions to serve their customers, instead of following the usual approval route. The trust on employees has increased and focus has shifted from constant monitoring and supervising to getting the job done and creating an impact on the ground. This also relates to the point we have made above on "connect to the purpose". The singular focus on the purpose and empowerment of frontline employees has led to unlocking of their discretionary efforts. One leader mentioned that in the organisation, sales team members used their personal vehicles to deliver consignments. This had been a result of messaging from management, allowing sales persons to use any means they have to get products out in the market.

This change was also being reflected more at senior levels. A major GIC's CHRO talked about how global leaders are empowering leaders at a local level and delegating decision-making. One example she quoted was getting approval for broadband connections. This process earlier required the chief financial officer's approval; now the local team is allowed to take this decision.

A top financial leader of a multinational technology company reported that to enable quick decision-making, he built a team from members associated with various functions and levels to work almost boundary-less to support their customers. A leading technology company shared that it never followed a command and control culture; this helped them during the crisis. It measures performance in terms of outcomes, not activity, to drive a culture of accountability. Work from home was seamless, as supervisors were never required to monitor tasks. Anyone in the organisation can share ideas, rather than waiting for the top management to think and give orders. A leading beverage company shared that it has a highly entrepreneurial way of doing things that involves a high degree of empowerment and inclusivity at the ground level. Operating levels in the organisation are empowered to take decisions if they find any gaps in quality or processes.

Relaxing hierarchy should not been seen as a reaction to the current situation but a common practice in the future. A leading Indian FMCG organisation's CHRO added that the removal of hierarchy allows leaders to receive feedback from multiple sources and a "reality check".

Organisations' decision-making authority increasingly lowered*

Not observed — 56%
Somewhat prevalent — 28%
Very prevalent — 15%

* Percentages do not total 100 due to rounding.

12

Leadership behaviour, the lighthouse in the journey

09. Leaders significantly upped their game when it comes to communication

Effective leaders are understanding their teams' circumstances and distractions. However, they find ways to engage and motivate their teams by clearly and thoroughly communicating important new goals and information. Frequent and varied communications of leadership with employees have become a key instrument to engage, energise, and maintain positivity across the board. About 69 percent companies have seen teams "over communicating" as a method to stay connected and build trust.

The communication is not limited to just business; it is equally important to connect with people at the personal level. We heard a resounding agreement with regard to this theme. Almost everyone we spoke to could not emphasise more on the importance of frequent communications in different shapes and forms. We heard stories of senior leaders connecting with individual team members. Some of them have also been connecting daily for a "pulse check". It is vital to relate on a personal level first, and then focus on work.

The promoter of an Indian auto manufacturing organisation recorded and shared a video with employees, including those at the floor level. The message made employees feel that the organisation was concerned about them, and their safety and well-being was the single most important priority.

In another instance when one of the leading Indian conglomerates decided to open its factory, it circulated a video featuring the CEO taking employees on a virtual tour of the factory. The company asked employees to share this video with their families to abate their concerns. Employees or their family members were allowed to contact the CEO in case of any concerns.

Change in communication levels at organisations

	Not observed	Somewhat prevalent	Very prevalent
	31%	33%	36%
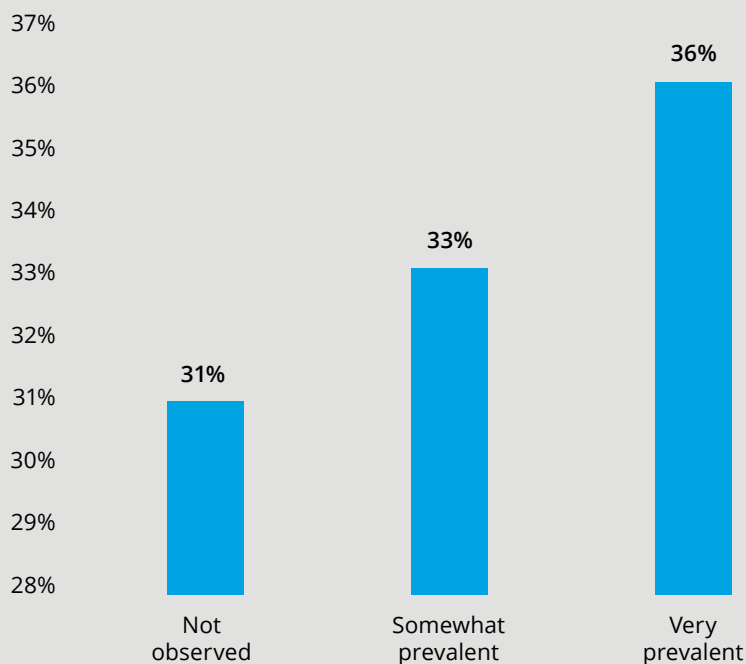
10. An overwhelming recognition of the importance of empathy has been observed

We saw most leaders recognising the human side of the pandemic, and empathising with employees. In March, more than a third of the population was in lockdown[4]. By the end of April, 1.6 billion workers faced an immediate danger of having their livelihoods destroyed[5].

Individuals and communities responded with empathy and strength. Despite many facing the risks of layoffs, furloughs, and shutdowns, organisations took fast action to protect their workers' health and safety, establish essential services, and deploy workforce strategies, to support workers in real time. Leaders have gone out of their ways to acknowledge the

shift in their employees' personal priorities towards family health and extended school closures. "Care", "compassion", and "concern" for employees were sentiments that reflected across organisations. Demonstrating compassionate leadership and making "dealing with the unfolding human tragedy" the first priority, became an imperative for leaders. About 46 percent leaders said that empathy was a highly prevalent leadership behaviour during the COVID-19 situation.

A leading health care organisation's CHRO spoke about how each conversation now starts with asking "how are you?" and "how can we help?" Leaders shared a directive that their priority is taking care of one self and families. If that meant de-prioritising work, they would not ask any questions.

Leaders treated their employees as real people with families just like their own and not as costs on a balance sheet

CHRO, Major Auto Component Manufacturer

11. As leaders have been confronting unanticipated situations, they have started encouraging more initiatives and decision-making across the organisation
Some leaders seem to realise that trusting teams and individuals, who are deeply embedded in a specific context and in the best position to come up with creative approaches, is the way to address unanticipated needs. In a few organisations, employees at the front line are being increasingly empowered to take decisions on the basis of their understanding of the ground situation without prior approval of their managers. A few leaders spoke about the structure changing from 'command control' to 'empowering bottom up'. Some leaders also recognised that making it safe for employees to express their views and opinions is the only way to drive the kind of meaningful collaboration that can translate its workforce's diversity into business value.

A leading FMCG organisation's CHRO accepted that during this crisis, none of the old methods worked. Leaders had to work with a huge amount of information and ambiguity to come up with multiple scenarios and build concrete plans. In addition, they removed the classical version of "management committees" and broke hierarchy. Multiple extended versions of management committees were formed and the size increased from 15 to 50.

Empathy as a leadership characteristic
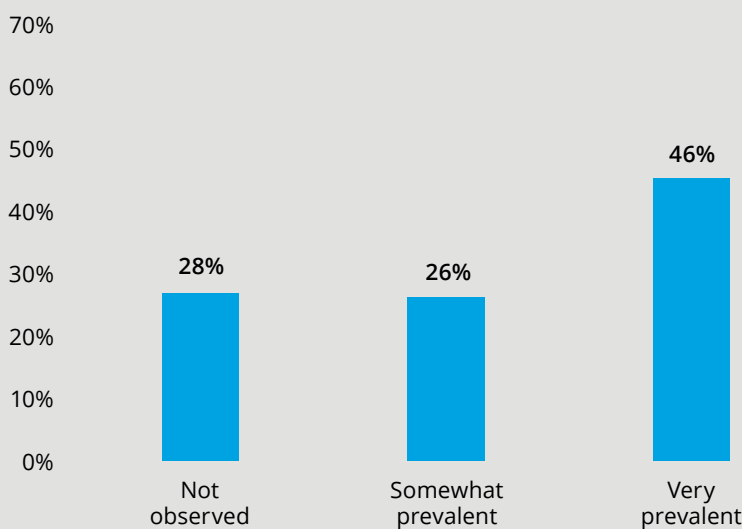
Organisations where leaders united teams through common goals (rather than by top-down rules), and team members had the autonomy to make decisions and provide input (instead of following a command-and-control structure), saw increased productivity and engagement levels.

Leadership team encouraged employees to make decisions across levels

Not observed	74%
Somehwat prevalent	13%
Very prevalent	13%

12. Leaders' ability to take quick decisions while grappling with uncertainty and complex information

One of the leadership behaviours that accentuated during these times was their ability to grasp the complexity of the situation. About 69 percent of the HR leaders interviewed reported that agility in decision-making has helped the company survive. We leant scenarios where leaders understood this complex information and drew unique insights, which enabled them to take the right decisions quickly. In 56 percent organisations interviewed, the leadership team was able to grasp the complexity of the situation and pre-empt difficult situations/crisis.

Effective leaders quickly gathered around the table for scenario planning and devising the way forward strategy to address the questions confronting them. Intent behind making a decision has become the focal point and leaders have become more tolerant of making mistakes. The decision-making process became simpler and was based on the thought, "If this helps us in achieving our purpose, let us go ahead". This has further been supplemented by extensive communication and an increase in the frequency at which leaders connect. The work from home arrangement and remote meetings seem to have also made decision-making easier as in-person meetings were no longer required for taking any decisions.

Strong leaders get ahead of changing circumstances. They take ownership during a crisis, even though many challenges and factors lie outside their control. A leading conglomerate's CHRO highlighted the criticality of leader behaviours in successfully traversing the COVID-19 journey. He said that within their organisations, "companies with more agile leaders have had better productivity. In many cases, the pre- and post-COVID production numbers actually match. These leaders proactively reached out to customers, invented schemes, provided incentives, and were able to reopen operations quicker."

An Indian FMCG organisation realised that one of its smaller factories producing hand sanitisers, suddenly became an extremely important part of its business. The usual route to increase capacity and add additional products was first going through R&D, procurement, and then manufacturing. This route was cut short. Leaders, along with the plant head, worked out together how to get the factory going, raise production, and get products out to the wider marker as soon as possible. This kind of quick movement was not something that would have happened before the COVID-19 crisis.

Leadership team's ability to take quick decisions in rapidly changing scenarios
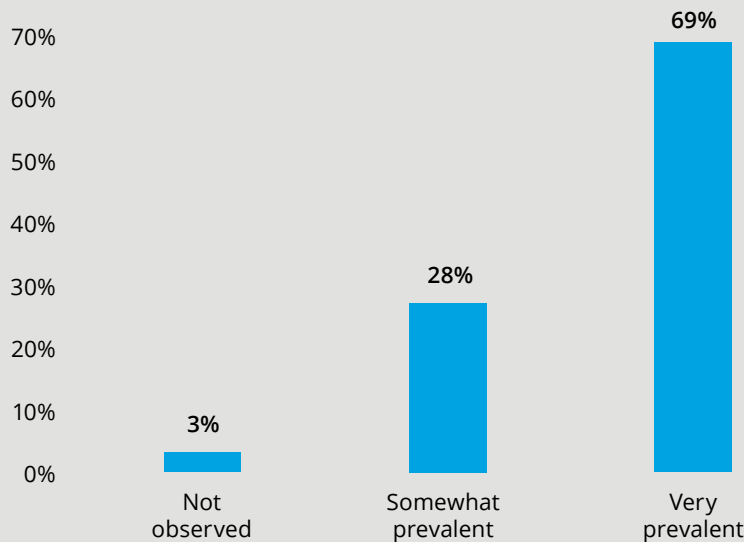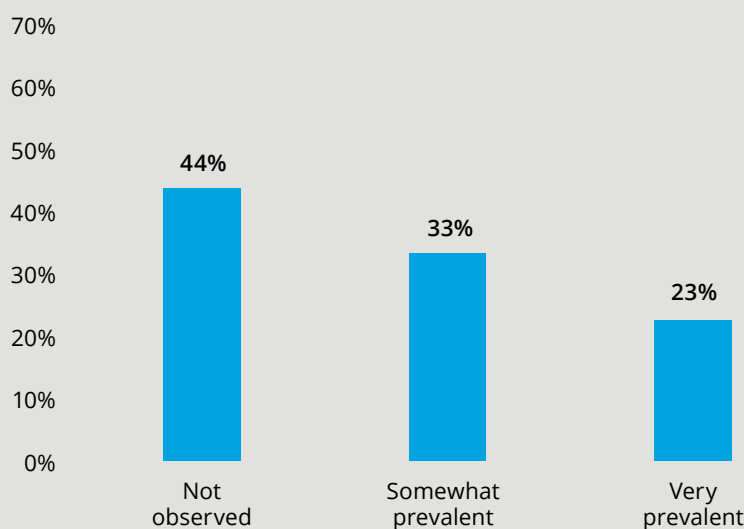
Priorities for the future

a. Workers' safety and well-being, along with their physical, mental, and financial security, are expected to be the top priority.

    About 54 percent organisations have reported that they will continue focusing on workers' safety and well-being. Offices need to be redesigned to ensure employees' well-being. Employees have been clocking more hours for work, thus resulting in exhaustion and stress of balancing both professional and personal demands. Many workers are experiencing burnout, making well-being a top priority in any organisation's return-to-work approach.

b. Re-skilling the workforce for the new normal

    COVID-19 reinforced the importance of understanding what workers are capable of doing than understanding what they have done before. Close to **51 percent organisations are working towards skilling and capability development of employees**, and equipping workers with future-ready skills to be able to perform effectively in the future.

c. Preparing for managing talent in the new normal

    Organisations are revamping the fundamental design of the talent management processes, such as performance management, career management, and employee engagement. About **46 percent organisations want to set a new path forward based on data, benchmarks, and human principles** in the form of purpose, fairness, transparency, growth, and collaboration.

    A leading technology firm's CHRO mentioned that its HR team is working on completely revamping the performance management process. It plans to remove individual goals and instead, focus on creating shared goals. The metrics will no longer be black and white like earlier. In the future, metrics such as client confidence, team confidence, and enterprise level objectives, could be vital.

d. Preparing for virtualisation as the new normal

    Organisations experienced virtual working at scale and that led to questioning of some long held assumptions about workplace design and workforce interactions. Most organisations are thinking of how this learning can be used in the future. About 46 percent organisations are

Leadership team's ability to pre-empt difficult situation/crisis

considering implications of introducing flexibility to take on required talent on board and using specialised skills for sometime (irrespective of location), as well as providing more opportunities to women workforce. Organisations are relooking at productivity norms, along with their structure, to explore roles that can be taken up remotely on a regular basis. Real estate spend and need for huge offices are being relooked at. Skills required to work and lead in a virtual world are getting attention.

e. Controlling costs and being cognizant of discretionary spends

About 23 percent organisations reported that they plan to change their cost structures. They want to ensure better utilisation of current recourses, while rethinking their current fixed expenditures. COVID-19 had a direct business impact. One of the reasons for that is a reduction in end consumers' purchasing power. Organisations want to think of every means to conserve cash and utilise resources to the maximum. Every resource has to improve customer experience for revenue. This needs a deeply entrenched entrepreneurial mindset in organisations.

Differentiating through culture markers

Role of culture in steering the organisation during crisis

A crisis is usually the best push for leaders and organisations to change their work processes and bring about a transformation. Moreover, for almost all the organisations, COVID-19 has made working digitally a necessity (rather than a good-to-have option). Our study revealed that certain themes are more prevalent than others. Overall, organisations that have a clear sense of purpose, and are intentionally collaborative, customer-centric, have a distributed decision-making process. They are also open to experiment to respond to the pandemic better.

This is in line with Deloitte's own belief that organisations with these characteristics or 'markers' are at the higher end of 'digital culture' and have an edge in responding to disruptions. In our extensive

research on digital organisations, culture and mindset have emerged as a major difference between working in a digital environment and a traditional one.[6] Digitally mature organisations have a strong propensity to encourage risk taking, foster innovation, and develop collaborative work environments.[7] Hence, for organisations to become mature, they need to look beyond more surface-level metrics, such as new technology and processes, and rethink their organisations' cultural DNA.

We have zeroed in on six key cultural attributes differentiating a digital organisation's culture – clarity, work style, organisational structure, risk appetite, customer experience, and tolerance to failure.

Innovation Culture Markers
Culture attributes

	Culture attribute	
Clear about 'what' Clarity on objectives, targets and goals	**Clarity**	**Clear about 'Why'** Clarity on purpose and 'why' in addition to the 'what'
Siloed Fixed team structures, siloed operations with strong and clarified boundaries	**Work style**	**Collaborative** Morphed team structure, democratized information and intentionally collaborative
Hierarchical Long-standing levels of hierarchy, decision making driven by positional authority and not proficiency	**Organizational structure**	**Distributed** Flattening and changing hierarchy and ongoing shifts in decision rights and power
Cautious Regulatory-determined risk appetite, siloed operations separating more risky and less risky businesses	**Risk appetite**	**Exploratory** Modulating risk and security boundaries to explore different paradigms
Customer focussed Analytics to anticipate customer needs, focus on customer feedback loop	**Customer experience**	**Customer Centric** Real time and on demand, increased customer involvement
Resistant to Fail Resistant to experiment, suffer analysis paralysis	**Tolerance to Failure**	**Experimentative** Fail early and fail fast, iterative and agile, comfortable in dealing with ambiguity

Source: Deloitte Analysis

Clarity: What vs. why

Traditional organisations tend to focus more on achieving clarity of objectives. Goals, targets, and processes define how the decisions are made in these organisations. However, digitally mature organisations focus on the question – 'Why are we doing what we are doing?' These organisations communicate and assess their success, not on metrics of target achievement and adherence to process, but on the extent to which they were able to create the desired impact and quality of service. This working around the purpose unlocks discretionary effort, collaboration, experimentation, and empowerment as everyone's focus is around achieving the common goal (not on functional/team metrics).

Work style: Siloed vs. collaborative

In traditional organisations, individuals working within certain teams and functions drive work. Even talent and skills are defined in the context of specific functional areas. On the other hand, digitally mature organisations work around teams that can be formed, morphed, and disbanded. These teams can include employees across functions, departments, and even partners, such as customers or service providers, from a wider ecosystem. There is a sense of intentional collaboration and cooperation for a common overarching cause. These organisations believe that collaboration across both physical and virtual spaces, is critical to align goals across technology, people, and processes, and deliver intended outcomes with desired customer and employee experience.[8]

Organisational structure: Hierarchical vs. distributive

Becoming a more digitally mature organisation also involves rethinking who needs to lead. These organisations are more likely to push the decision-making authority down to the lower levels for better execution. Individual employees are more empowered to make decisions and effectively lead, while leaders' role has expanded from making and exerting hierarchical commands and control, to influencing.[7] Decision-making becomes more fluid with decisions made by those who have relevant information, influence, and skill rather than who is at the top.

Risk appetite: Cautious vs. exploratory

As organisations move up the digital maturity scale, their acceptance of risk increases. Traditional organisations have a regulatory-driven approach and a tendency to separate riskier parts of the business. While adhering to regulations and rules is important, digitally mature companies explore various aspects of how to innovate within these boundaries. Being exploratory is not so much about breaking regulations; it is about not allowing them to inhibit thinking to certain processes and mindset within an organisation.

Customer experience: Customer focused vs. customer centric

Digital organisations look at their customers as strategic partners in their journey. They make efforts to understand customers' underlying needs, instead of just the stated ones. Digitally mature organisations engage with customers and rapidly collect data from their interaction and reaction with products and services. This data is then used to make quick and constant updates based directly on customer feedback and other sensing approaches.[8] This allows for greater customer involvement in the creation of the goods and services, and deeper brand loyalty.

Tolerance to failure: Resistant to fail vs. experimentative

Established companies struggle to experiment because they are often driven by a fear of failure. Digitally mature companies, on the other hand, are comfortable failing in their efforts to achieve their purpose. In these companies, new ideas are encouraged across levels and analysed for feedback and possible iterations to learn new ways of working. Instead of creating stigma around failures, they openly share feedback of failed experiments to increase organisational learning.[6] These organisations build a culture of continuous learning from failures to manage ambiguity and move with speed.

Conclusive remarks

We are witnessing significant shifts in culture and mindset across organisations as digital maturity is considered important for recovering and thriving in uncertain times. Companies that were already at the higher end of the digital maturity scale, have seen their culture markers strengthen by this crisis. However, those at the lower end have accelerated their transformation efforts. While these culture markers are prevalent in different degrees, their importance is expected to rise in the future. Leaders will also need to move beyond their roles in organisations to lay greater emphasis on empathy and make quick decisions despite ambiguity. In the future, organisations will focus more on preparing the workforce and workplace for the new normal. Immense and dedicated efforts to adapt to the digital mindset and become digital across aspects are likely to be the critical factor that can differentiate organisations in the future.

Appendix: Survey questions and responses
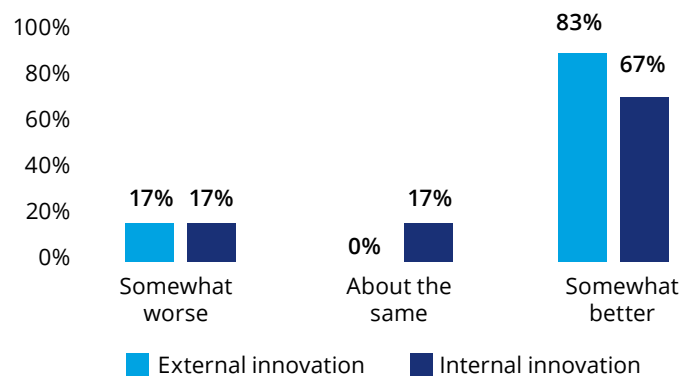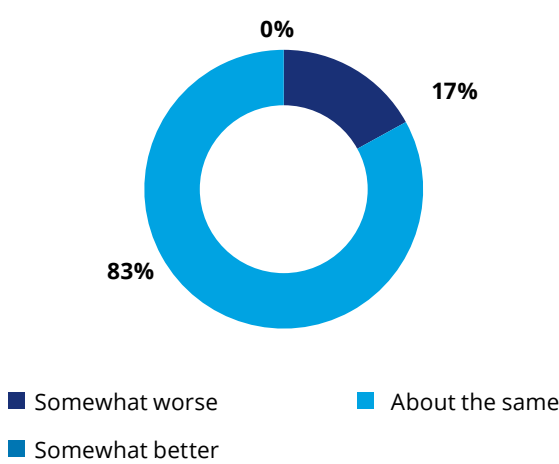
Performance

• **To what extent, the lockdown has affected your ability to serve your customers (internal/external) satisfactorily.**

3%   **3%**

41%   **54%**

■ Much worse   ■ Somewhat worse
■ About the same   ■ Somewhat better
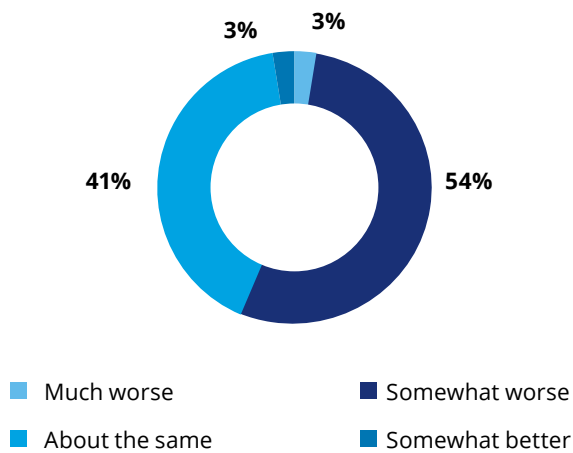
*Percentages do not total 100 due to rounding.

• **To what extent, employee productivity has been affected due to the remote work situation.**
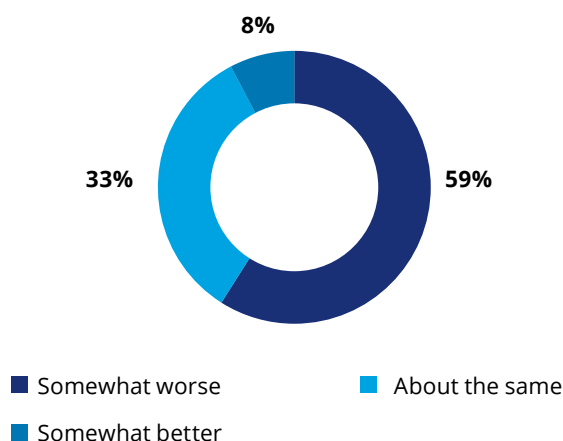
8%

33%   **59%**

■ Somewhat worse   ■ About the same
■ Somewhat better

• **To what extent has the pandemic affected the organisation's ability to innovate externally and internally.**

	Somewhat worse	About the same	Somewhat better
External innovation	5%	33%	62%
Internal innovation	3%	23%	74%

■ External innovation   ■ Internal innovation

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing**

	Not observed	Somewhat prevalent	Very prevalent
	15%	46%	38%

- **We continuously explored new opportunities and pushed boundaries of risk.***

	Not observed	Somewhat prevalent	Very prevalent
	15%	51%	33%
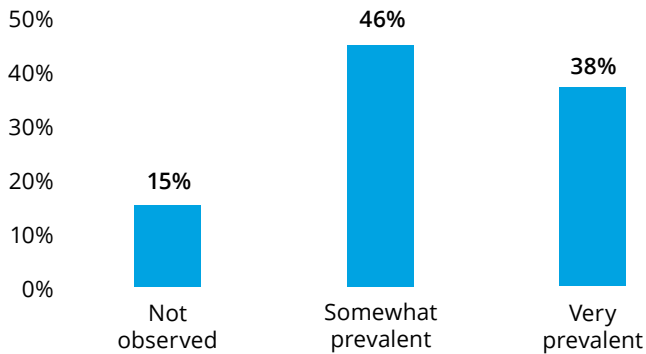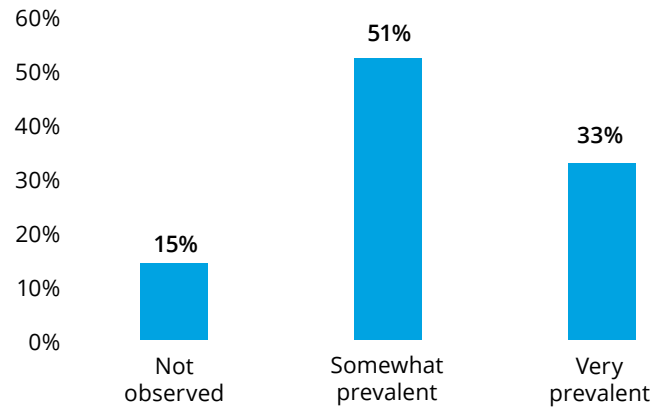
* Percentage do not total 100 due to rounding

- **We worked in a morphed team structure and were intentionally collaborative.**

	Not observed	Somewhat prevalent	Very prevalent
	8%	18%	74%

- **We were closely involved with our customers with a real-time exchange of information to provide services/ products on demand.**

	Not observed	Somewhat prevalent	Very prevalent
	18%	54%	28%

- **The decision-making authority was increasingly lowered to front-line employees.**

	Not observed	Somewhat prevalent	Very prevalent
	56%	28%	15%

- **We were comfortable in dealing with ambiguity and encouraged to experiment, fail early, and fail fast.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	59%	41%

* Percentages do not total 100 due to rounding.

Leadership

• **The leadership team grasped the situation's complexity and was able to pre-empt situations/crisis.**

Not observed: 44%
Somewhat prevalent: 33%
Very prevalent: 23%

• **The leadership team was able to take quick decisions in a rapidly changing scenario.**
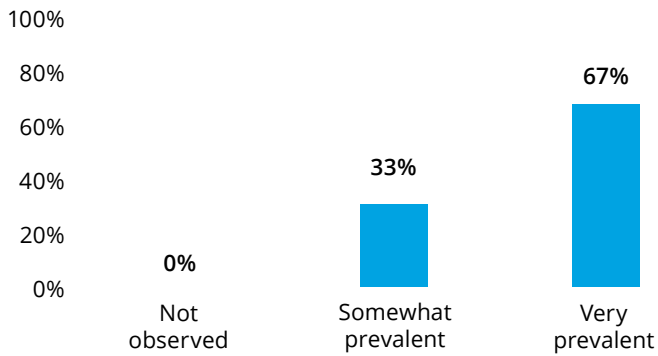

Not observed: 3%
Somewhat prevalent: 28%
Very prevalent: 69%

• **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**
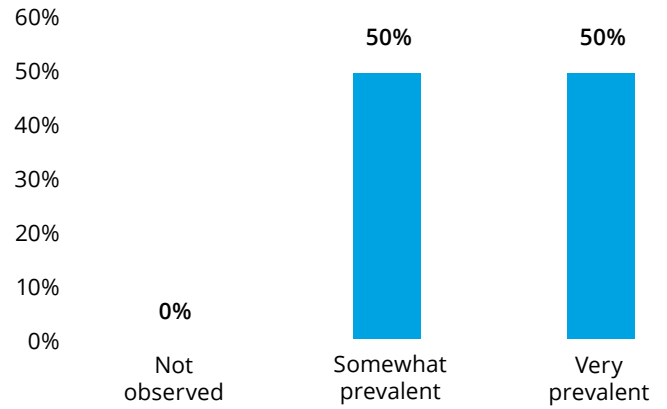

Not observed: 0%
Somewhat prevalent: 54%
Very prevalent: 46%

• **The leadership team had a relentless desire to excel, even in the most demanding situations.**

Not observed: 8%
Somewhat prevalent: 33%
Very prevalent: 59%

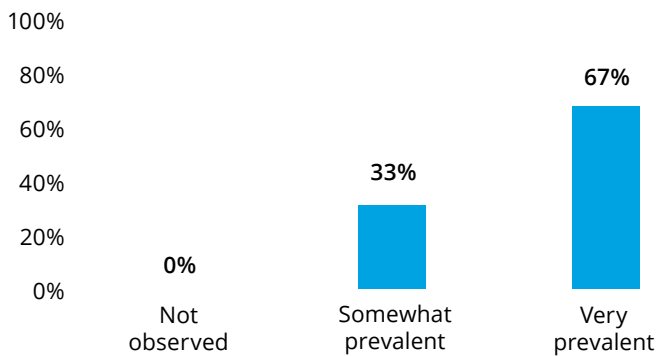- **The leadership team displayed mental toughness and perseverance in difficult times and rapidly changing situations.**

3% Not observed
56% Somewhat prevalent
41% Very prevalent

- **The leadership team was able to collaborate seamlessly with different stakeholders.**
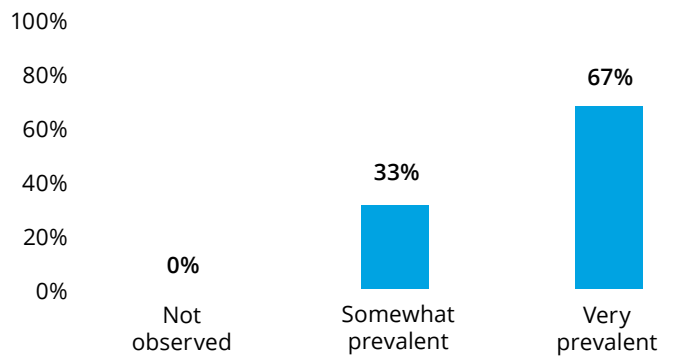

13% Not observed
33% Somewhat prevalent
54% Very prevalent

- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

5% Not observed
41% Somewhat prevalent
54% Very prevalent

- **The leadership team had confidence in taking lead in any situation.**

10% Not observed
46% Somewhat prevalent
44% Very prevalent

Sectoral

- 13%
- 18%
- 8%
- 15%
- 10%
- 10%
- 13%
- 13%

Legend:
- GIC
- Banking
- Conglomerate
- IT
- FMCG
- Manufacturing
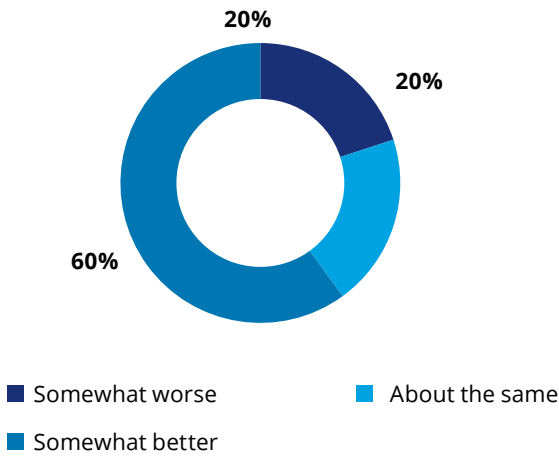- Pharmaceutical and healthcare products
- Others

Sector 1: GIC

Performance

- **To what extent, the lockdown has affected your ability to serve your customers (internal/external) satisfactorily.**

- 14%
- 29%
- 57%

■ Somewhat worse ■ About the same ■ Somewhat better

- **To what extent, the pandemic has affected the organisation's ability to innovate externally and internally.**

Somewhat worse: External innovation 0%, Internal innovation 0%
About the same: External innovation 43%, Internal innovation 14%
Somewhat better: External innovation 57%, Internal innovation 86%

■ External innovation ■ Internal innovation

- **To what extent, employee productivity has been affected due to the remote working situation.**

- 14%
- 29%
- 57%

■ Somewhat worse ■ About the same ■ Somewhat better
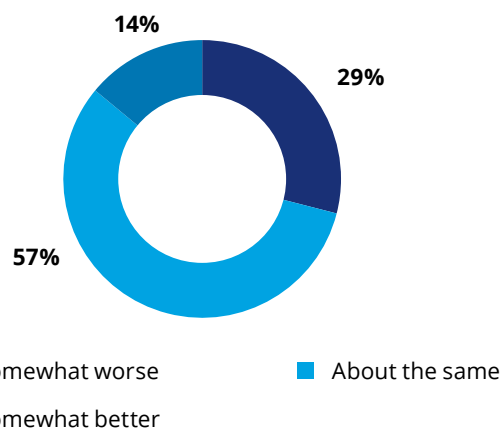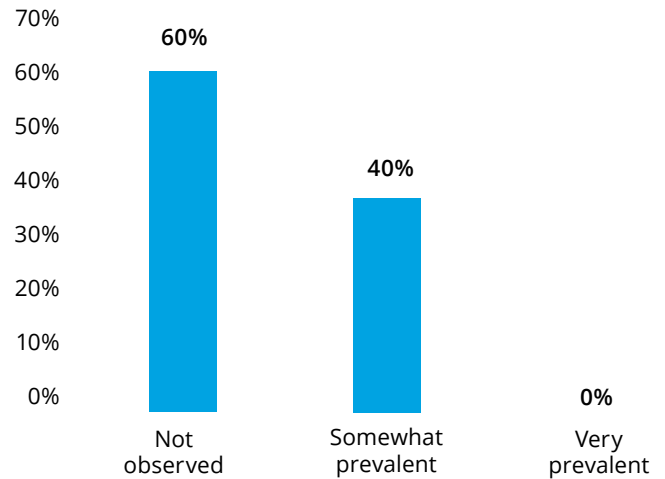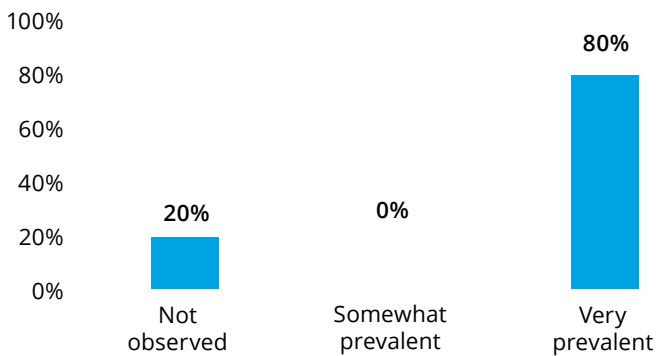
Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**
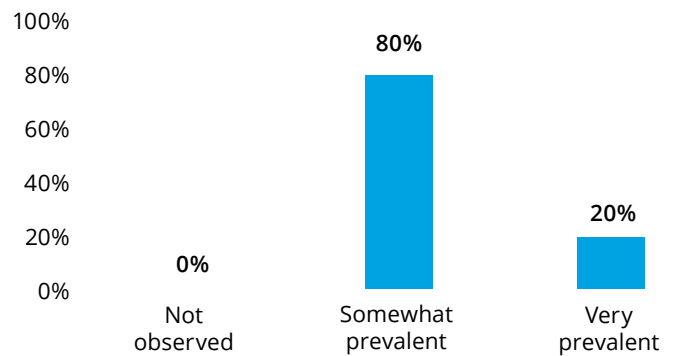

- **We continuously explored new opportunities and pushed boundaries of risk.**
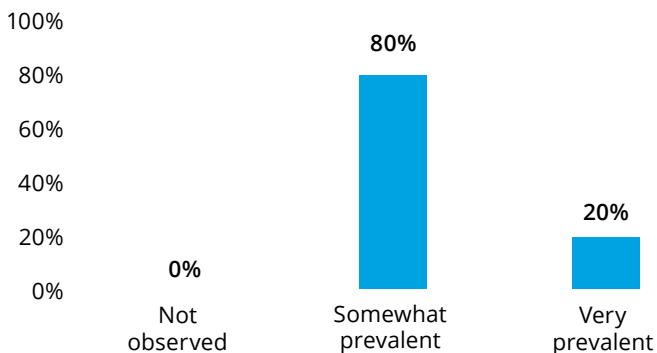

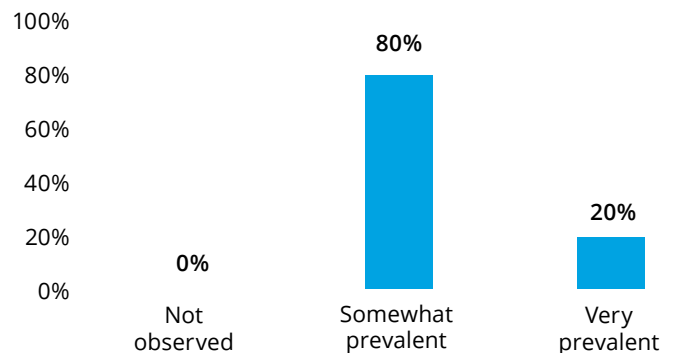- **We worked in a morphed team structure and were intentionally collaborative.**
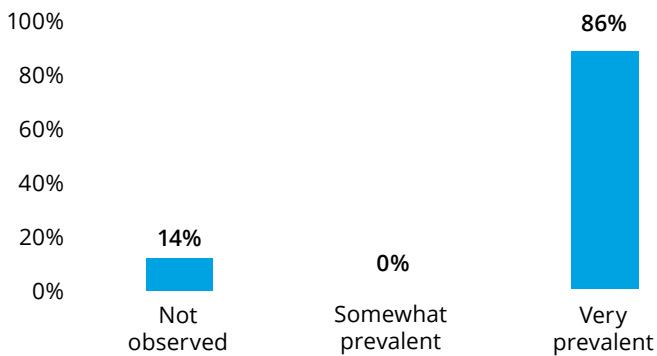
- **We were closely involved with our customer with real-time exchange of information to provide services/products on demand.**
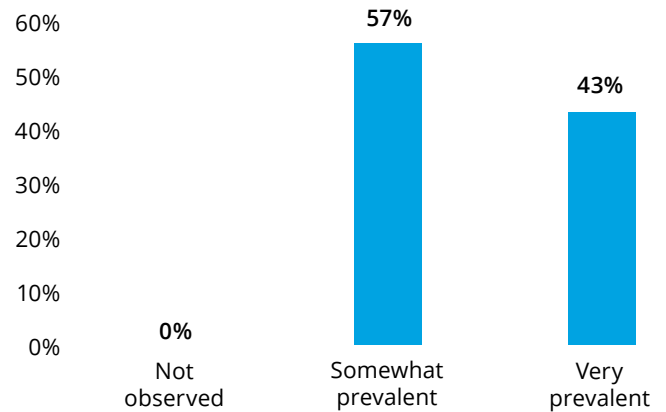
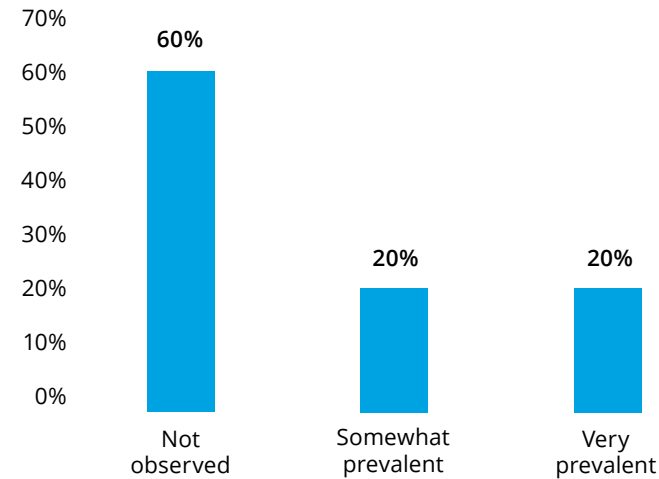- **The decision-making authority was increasingly lowered to front-line employees.**
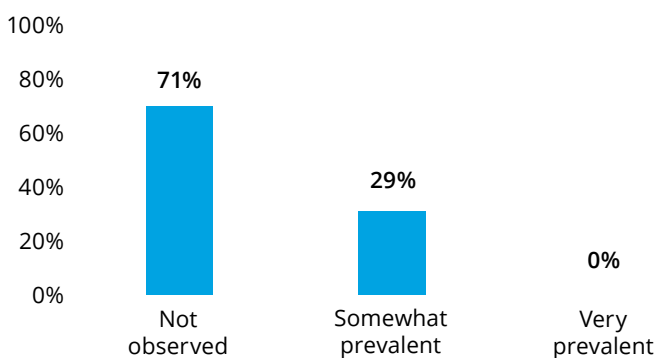
- **We were comfortable in dealing with ambiguity and encouraged to experiment, fail early, and fail fast.**
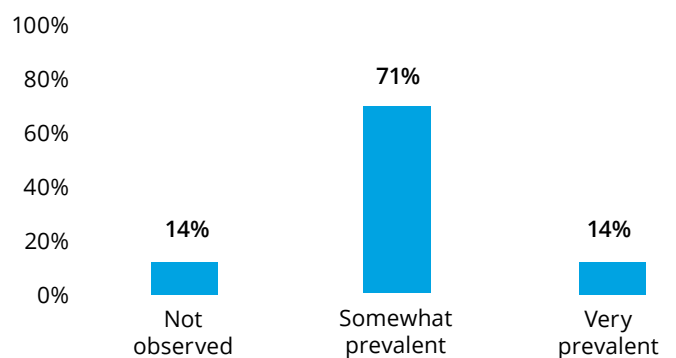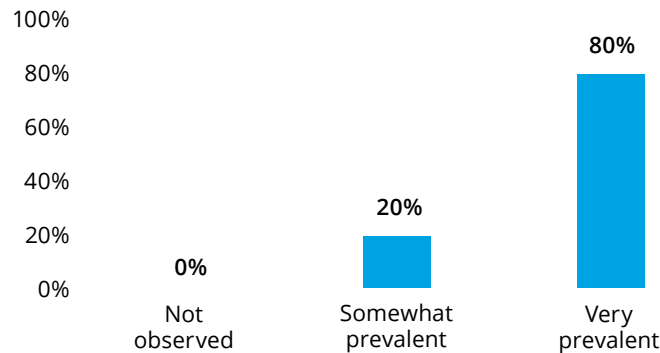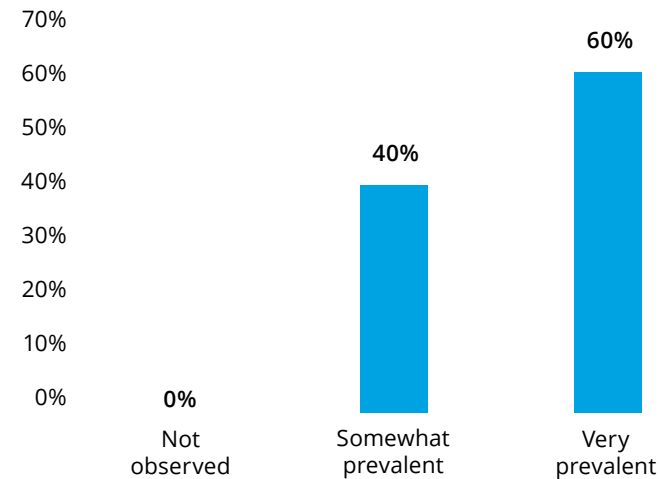

* Percentages do not total 100 due to rounding.

Leadership

- **The leadership team grasped the situation's complexity and was able to pre-empt difficult situations/crisis.**
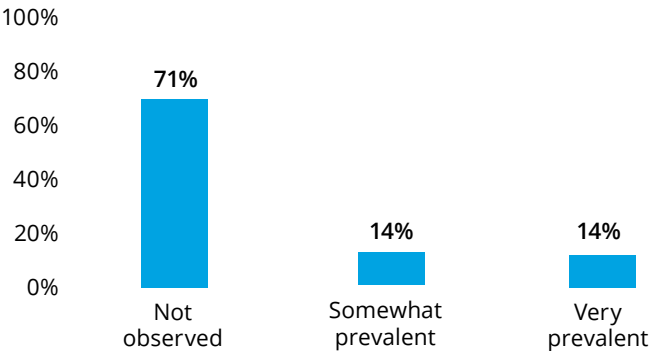
* Percentages do not total 100 due to rounding.

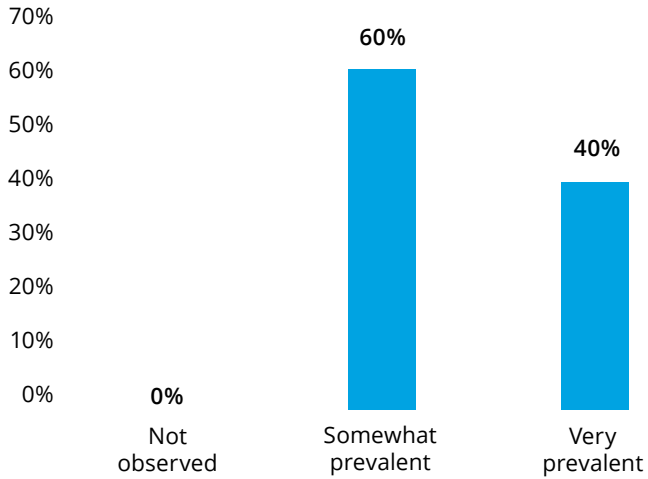- **The leadership team had a relentless desire to excel, even in the most demanding situations.**
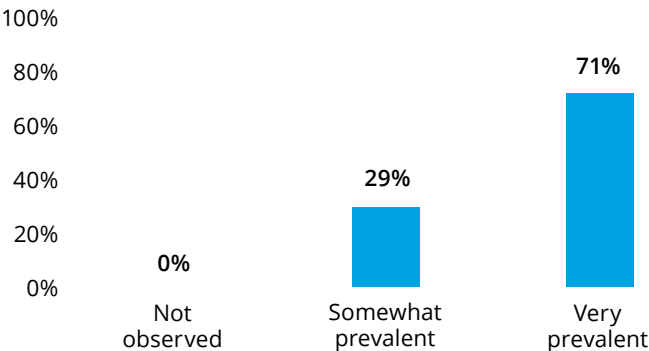
- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**
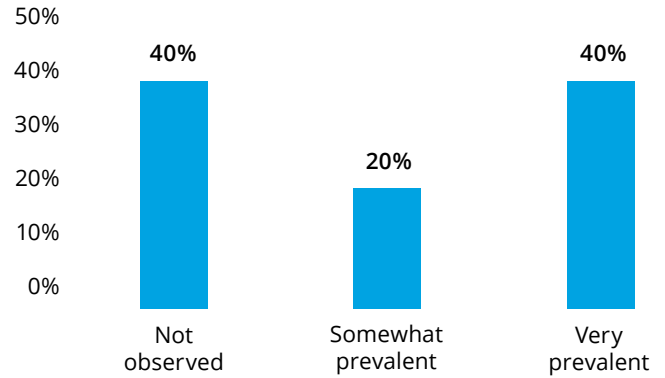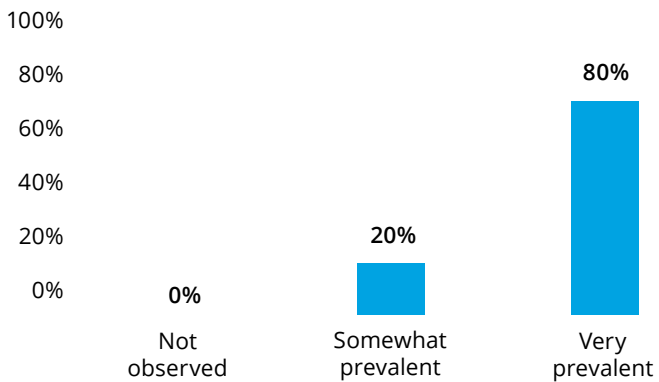

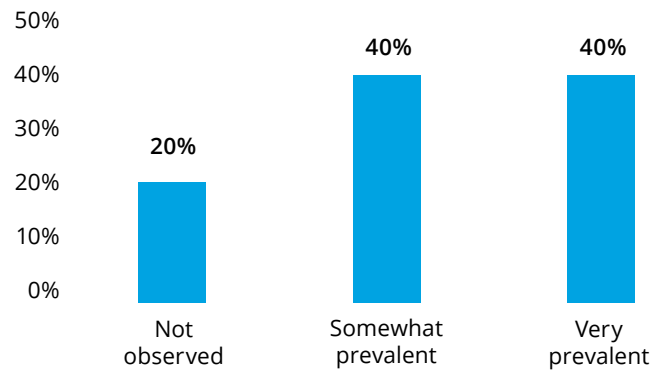- **Leadership team displayed mental toughness and perseverance in difficult times and rapidly changing situations.**

• **The leadership team was able to take quick decisions in a rapidly changing scenario.**

Not observed: 0%
Somewhat prevalent: 29%
Very prevalent: 71%

• **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

Not observed: 0%
Somewhat prevalent: 14%
Very prevalent: 86%

• **The leadership team was able to collaborate seamlessly with different stakeholders.**

Not observed: 29%
Somewhat prevalent: 43%
Very prevalent: 29%

• **The leadership team had confidence in taking lead in any situation.**

Not observed: 14%
Somewhat prevalent: 43%
Very prevalent: 43%
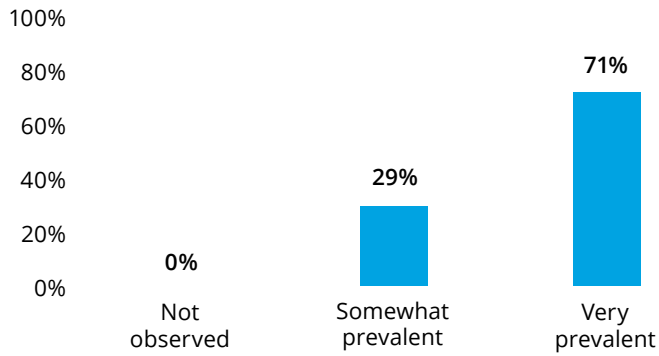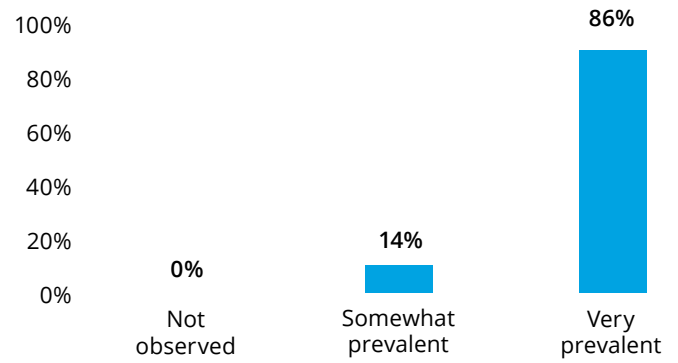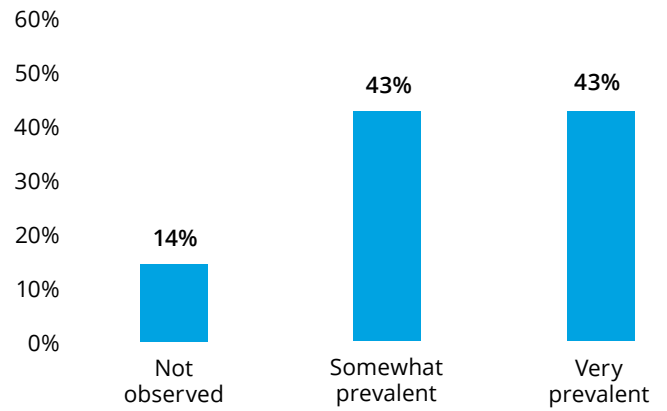
* Percentages do not total 100 due to rounding.

Sector 2: FMCG

Performance

- **To what extent, the lockdown has affected your ability to serve your customers (internal/ external) satisfactorily.**

0%

67%

33%

- Somewhat worse
- About the same
- Somewhat better

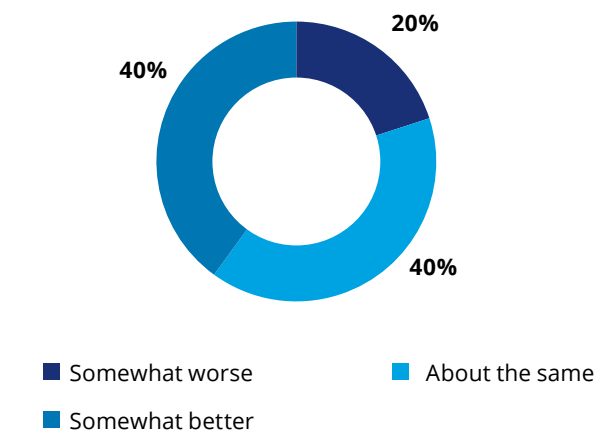- **To what extent, the pandemic has affected the organisation's ability to innovate externally and internally.**

- External innovation
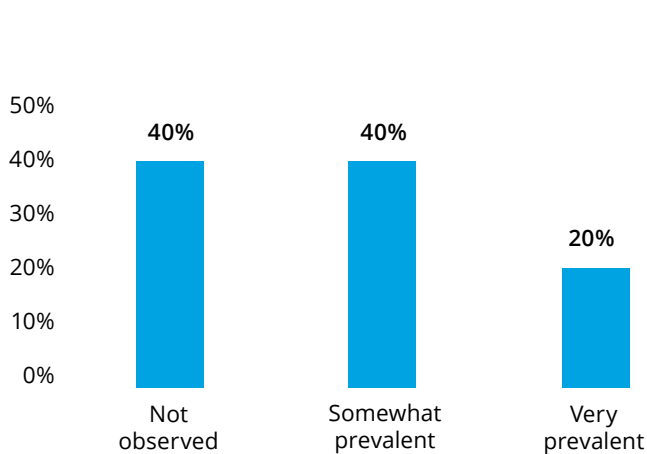- Internal innovation

- **To what extent, employee productivity has been affected due to the remote working situation.**

0%

17%

83%

- Somewhat worse
- About the same
- Somewhat better

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**

Not observed: 0%
Somewhat prevalent: 33%
Very prevalent: 67%

- **We continuously explored new opportunities and pushed boundaries of risk.**

Not observed: 0%
Somewhat prevalent: 50%
Very prevalent: 50%

- **We worked in a morphed team structure and were intentionally collaborative.**

Not observed: 0%
Somewhat prevalent: 17%
Very prevalent: 83%
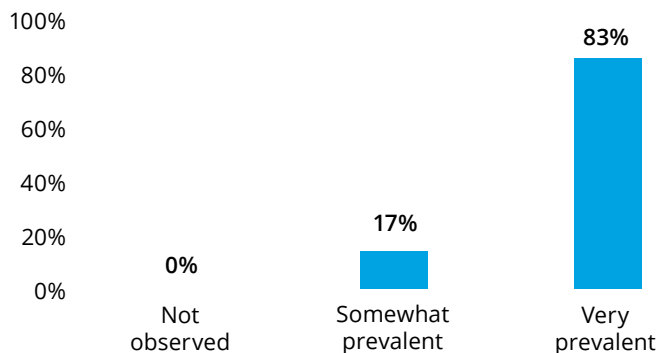
- **We were closely involved with our customer with a real-time exchange of information to provide services/ products on demand.**

Not observed: 17%
Somewhat prevalent: 67%
Very prevalent: 17%

- **The decision-making authority was increasingly lowered to front-line employees.**

Not observed: 0%
Somewhat prevalent: 67%
Very prevalent: 33%

- **We were comfortable in dealing with ambiguity, and encouraged to experiment, fail early, and fail fast.**

Not observed: 0%
Somewhat prevalent: 67%
Very prevalent: 33%

Leadership

- **The leadership team grasped the situation's complexity and was able to pre-empt difficult situations/crisis.**

0%	67%	33%
Not observed	Somewhat prevalent	Very prevalent

- **The leadership team was able to take quick decisions in a rapidly changing scenario.**

0%	17%	83%
Not observed	Somewhat prevalent	Very prevalent

- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**

0%	83%	17%
Not observed	Somewhat prevalent	Very prevalent

- **The leadership team had a relentless desire to excel, even in the most demanding situations.**

0%	50%	50%
Not observed	Somewhat prevalent	Very prevalent

- **Leadership team displayed mental toughness and perseverance in difficult times and rapidly changing situations.**

Not observed	Somewhat prevalent	Very prevalent
0%	33%	67%

- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

Not observed	Somewhat prevalent	Very prevalent
0%	50%	50%

- **The leadership team was able to collaborate seamlessly with different stakeholders.**

Not observed	Somewhat prevalent	Very prevalent
0%	33%	67%

- **The leadership team had confidence in taking lead in any situation.**

Not observed	Somewhat prevalent	Very prevalent
0%	33%	67%

Sector 3: Banking

Performance

- **To what extent, the lockdown has affected your ability to serve your customers (internal/ external) satisfactorily.**

20%

20%

60%

■ Somewhat worse ■ About the same

■ Somewhat better

- **To what extent the pandemic has affected the organisation's ability to innovate externally and internally.**

| | 100% |
| 80% |
| 80% 60% |
| 60% |
| 40% 40% |
| 20% 20% |
| 0% 0% 0% |

Somewhat worse   About the same   Somewhat better

■ External innovation ■ Internal innovation

- **To what extent, employee productivity has been affected due to the remote working situation.**

20%

20%

60%

■ Somewhat worse ■ About the same

■ Somewhat better

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	60%	40%

- **We continuously explored new opportunities and pushed boundaries of risk.**

	Not observed	Somewhat prevalent	Very prevalent
	60%	40%	0%

- **We worked in a morphed team structure and were intentionally collaborative.**

	Not observed	Somewhat prevalent	Very prevalent
	20%	0%	80%

- **We were closely involved with our customers with a real-time exchange of information to provide services/products on demand.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	80%	20%

- **The decision-making authority was increasingly lowered to front-line employees.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	80%	20%

- **We were comfortable in dealing with ambiguity, and encouraged to experiment, fail early, and fail fast.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	80%	20%

Leadership

- **The leadership team grasped the situation's complexity and was able to pre-empt situations/crisis.**

- **The leadership team was able to take quick decisions in a rapidly changing scenario.**

- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**

- **The leadership team had a relentless desire to excel, even in the most demanding situations.**

- **The leadership team displayed mental toughness and perseverance in difficult times and rapidly changing situations.**

Not observed	Somewhat prevalent	Very prevalent
0%	60%	40%

- **The leadership team was able to collaborate seamlessly with different stakeholders.**

Not observed	Somewhat prevalent	Very prevalent
40%	20%	40%

- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

Not observed	Somewhat prevalent	Very prevalent
0%	20%	80%

- **The leadership team had confidence in taking lead in any situation.**

Not observed	Somewhat prevalent	Very prevalent
20%	40%	40%

Sector 4: Manufacturing

Performance

- **To what extent the lockdown has affected your ability to serve your customers (internal/external) satisfactorily.**

0%   0%

100%

■ Somewhat worse   ■ About the same

■ Somewhat better

- **To what extent, the pandemic has affected the organisation's ability to innovate externally and internally.**

■ External innovation   ■ Internal innovation

- **To what extent, employee productivity has been affected due to the remote working situation.**

20%

40%

40%

■ Somewhat worse   ■ About the same

■ Somewhat better

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**

Category	Value
Not observed	40%
Somewhat prevalent	40%
Very prevalent	20%

- **We continuously explored new opportunities and pushed boundaries of risk.**

Category	Value
Not observed	0%
Somewhat prevalent	60%
Very prevalent	40%

- **We worked in a morphed team structure and were intentionally collaborative.**

Category	Value
Not observed	0%
Somewhat prevalent	20%
Very prevalent	80%

- **We were closely involved with our customers with a real-time exchange of information to provide services/ products on demand.**

Category	Value
Not observed	20%
Somewhat prevalent	60%
Very prevalent	20%

- **The decision-making authority was increasingly lowered to front-line employees.**

Category	Value
Not observed	60%
Somewhat prevalent	20%
Very prevalent	20%

- **We were comfortable in dealing with ambiguity and were encouraged to experiment, fail early and fail fast**

Category	Value
Not observed	0%
Somewhat prevalent	60%
Very prevalent	40%
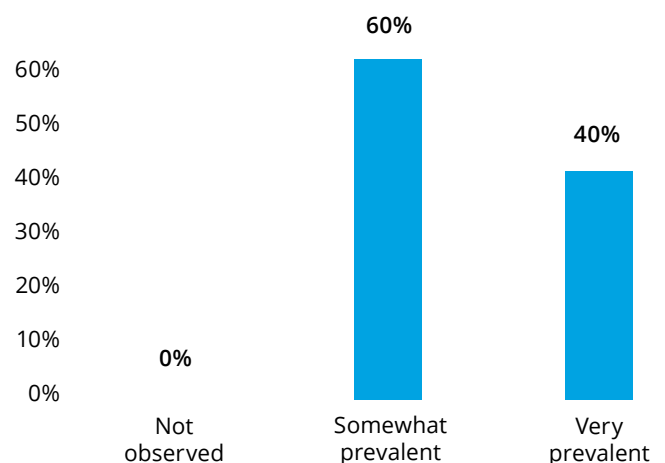
Leadership

- **The leadership team grasped the complexity of the situation and was able to pre-empt situations/crisis.**

Not observed: 80%
Somewhat prevalent: 20%
Very prevalent: 0%
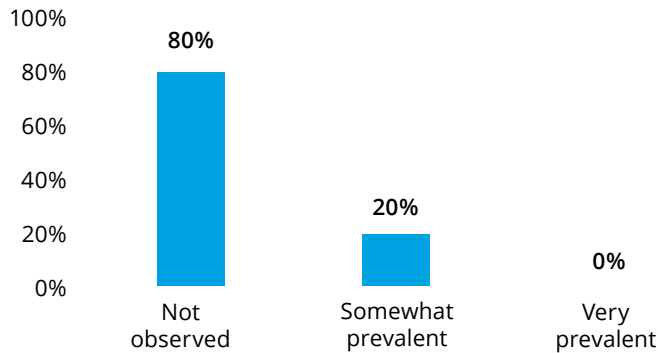
- **The leadership team were able to take quick decisions in a rapidly changing scenario**
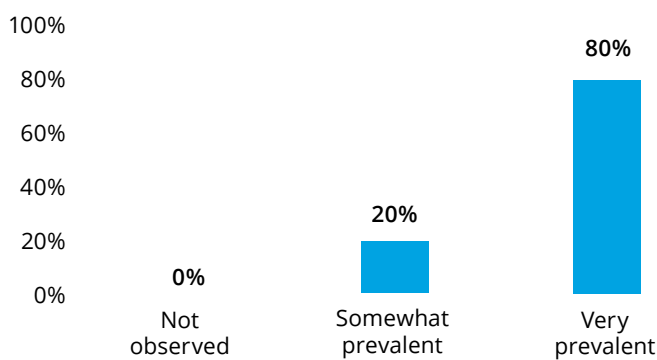
Not observed: 0%
Somewhat prevalent: 20%
Very prevalent: 80%

- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**

Not observed: 0%
Somewhat prevalent: 60%
Very prevalent: 40%

- **The leadership team had a relentless desire to excel, even in the most demanding situations.**

Not observed: 0%
Somewhat prevalent: 20%
Very prevalent: 80%

- **The leadership team displayed mental toughness and perseverance in difficult times and rapidly changing situations.**

20%	20%	60%
Not observed	Somewhat prevalent	Very prevalent

- **The leadership team was able to collaborate seamlessly with different stakeholders.**

0%	60%	40%
Not observed	Somewhat prevalent	Very prevalent

- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

0%	60%	40%
Not observed	Somewhat prevalent	Very prevalent

- **The leadership team had confidence in taking lead in any situation.**

0%	60%	40%
Not observed	Somewhat prevalent	Very prevalent
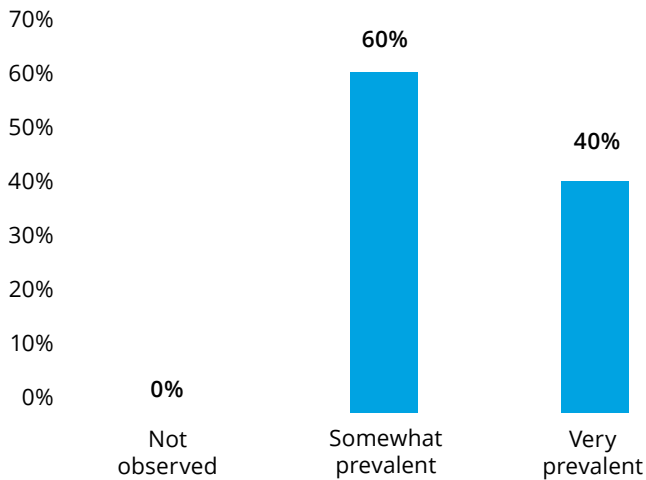
Sector 5: Conglomerate

Performance

• **To what extent, the lockdown has affected your ability to serve your customers (internal/external) satisfactorily.**

0%

25%

75%

■ Somewhat worse   ■ About the same

■ Somewhat better

• **To what extent, the pandemic has affected the organisation's ability to innovate externally and internally.**

100%

80%

75%

60%

50%   50%

40%   25%

20%

0%   0%   0%

Somewhat   About the   Somewhat
worse   same   better

■ External innovation   ■ Internal innovation

• **To what extent, employee productivity has been affected due to the remote working situation.**

25%   25%

50%

■ Somewhat worse   ■ About the same

■ Somewhat better

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**

- **We continuously explored new opportunities and pushed boundaries of risk.**

- **We worked in a morphed team structure and were intentionally collaborative.**

- **We were closely involved with our customers with a real-time exchange of information to provide services/ products on demand.**

- **The decision-making authority was increasingly lowered to front-line employees.**

- **We were comfortable in dealing with ambiguity, and encouraged to experiment, fail early, and fail fast.**

Leadership

- **The leadership team grasped the situation's complexity and was able to pre-empt difficult situations/crisis.**

	Not observed	Somewhat prevalent	Very prevalent
	50%	50%	0%

- **The leadership team was able to take quick decisions in a rapidly changing scenario.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	50%	50%

- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	50%	50%

- **The leadership team had a relentless desire to excel, even in the most demanding situations.**

	Not observed	Somewhat prevalent	Very prevalent
	25%	25%	50%

- **The leadership team displayed mental toughness, and perseverance in difficult times and rapidly changing situations.**

- **The leadership team was able to collaborate seamlessly with different stakeholders.**

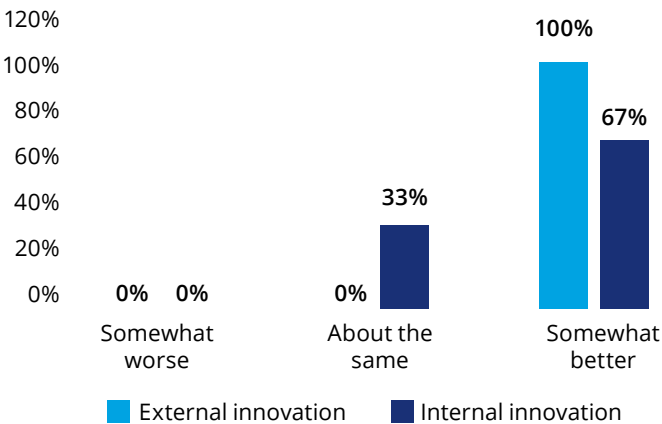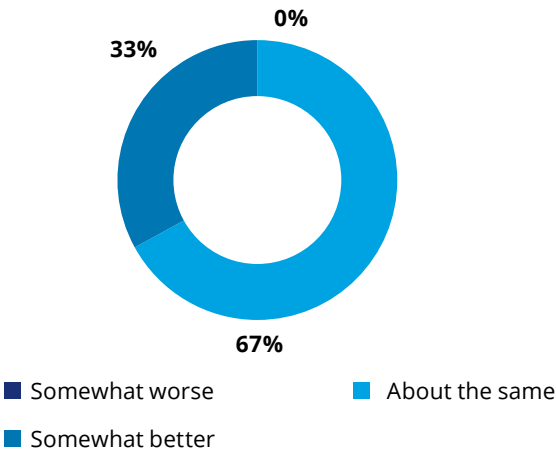- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

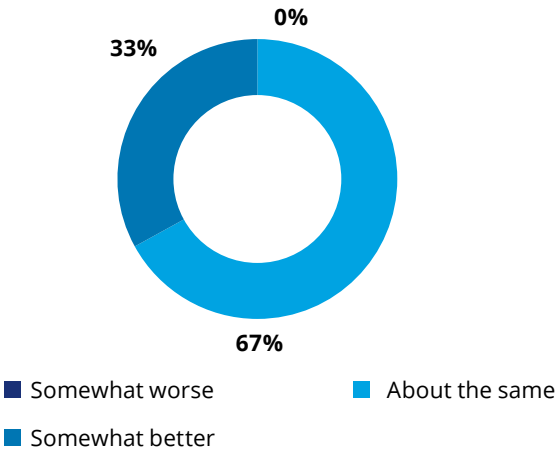- **The leadership team had confidence in taking lead in any situation.**

Sector 6: Pharmaceutical and healthcare products

Performance

• **To what extent, the lockdown has affected your ability to serve your customers (internal/external) satisfactorily.**

0%
25%
75%

■ Somewhat worse ■ About the same

■ Somewhat better

• **To what extent, the pandemic has affected the organisation's ability to innovate externally and internally.**

120%
100%
80%
60%
40%
20%
0%

25% 0% 0% 0% 75% 100%

Somewhat worse About the same Somewhat better

■ External innovation ■ Internal innovation

• **To what extent, employee productivity has been affected due to the remote working situation.**

0%
25%
75%

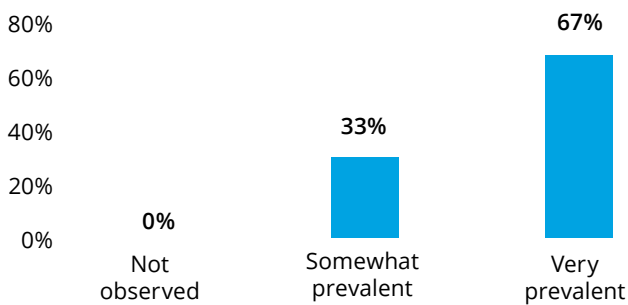■ Somewhat worse ■ About the same

■ Somewhat better

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**
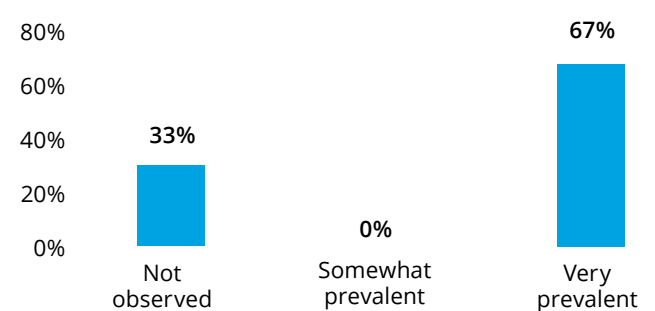

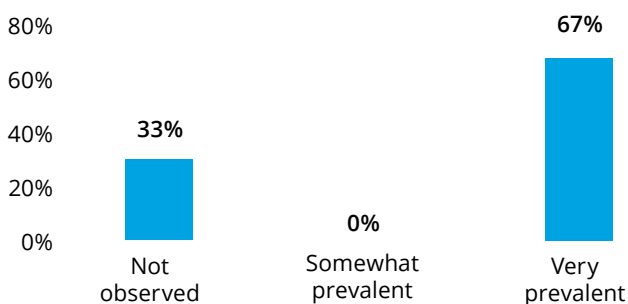- **We continuously explored new opportunities and pushed boundaries of risk.**

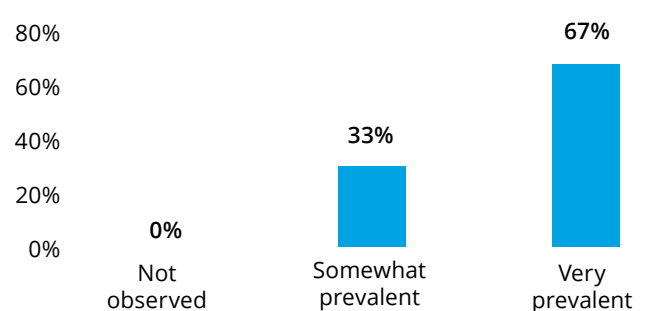- **We worked in a morphed team structure and were intentionally collaborative.**

- **We were closely involved with our customers with a real-time exchange of information to provide services/products on demand.**

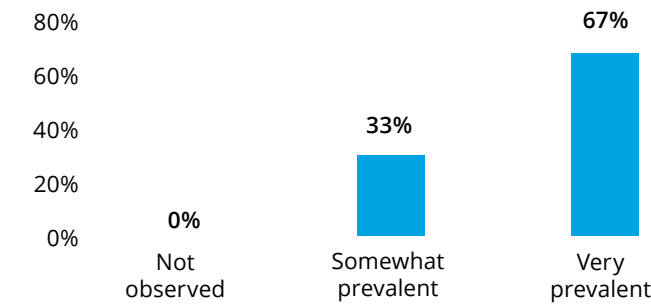- **The decision-making authority was increasingly lowered to front-line employees.**

- **We were comfortable in dealing with ambiguity, and encouraged to experiment, fail early, and fail fast.**
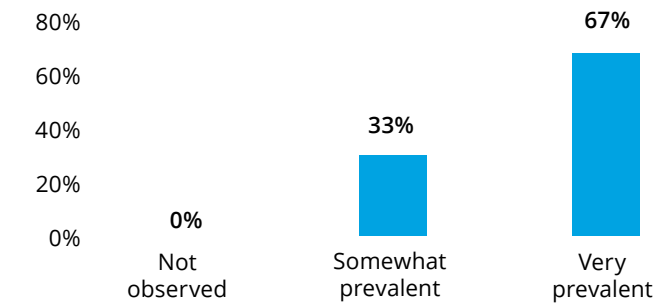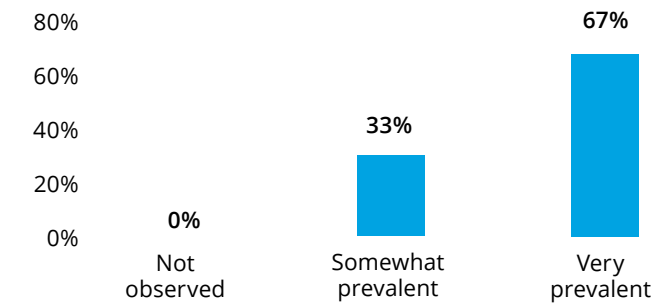
Leadership

- **The leadership team grasped the situation's complexity and was able to pre-empt difficult situations/crisis.**
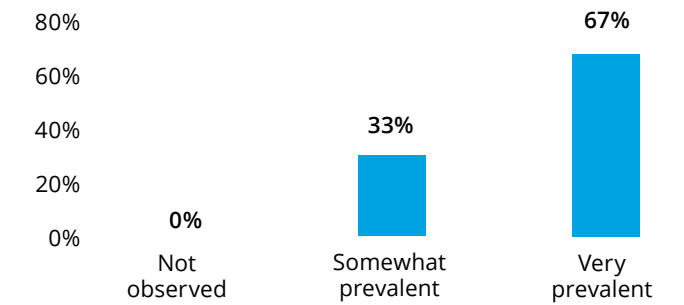

- **The leadership team was able to take quick decisions in a rapidly changing scenario.**
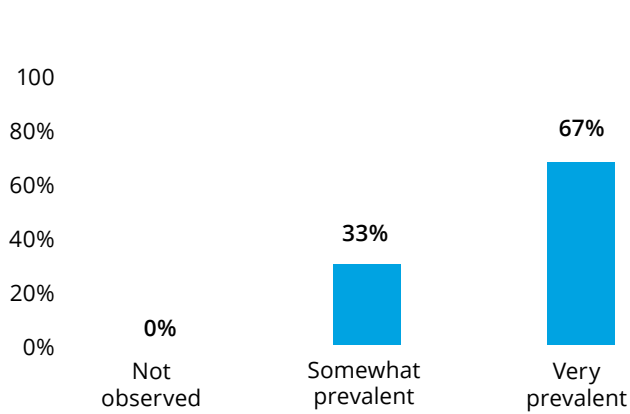

- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**
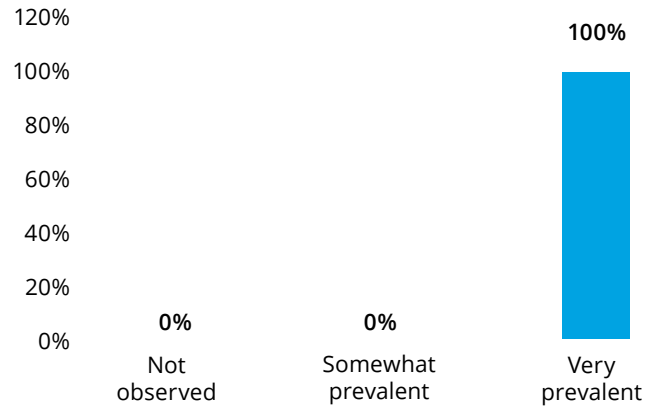

- **The leadership team had a relentless desire to excel, even in the most demanding situations.**
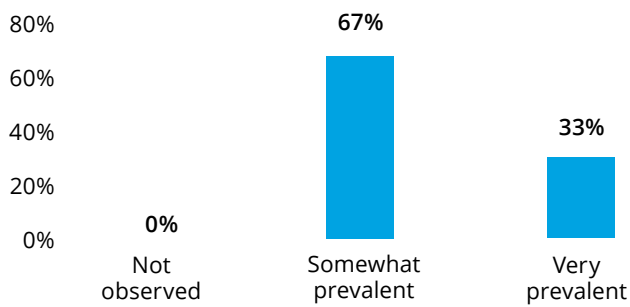
- **The leadership team displayed mental toughness and perseverance in difficult times and rapidly changing situations.**
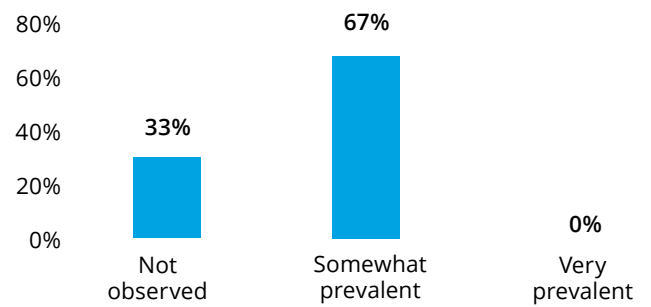

- **The leadership team was able to collaborate seamlessly with different stakeholders.**

- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**
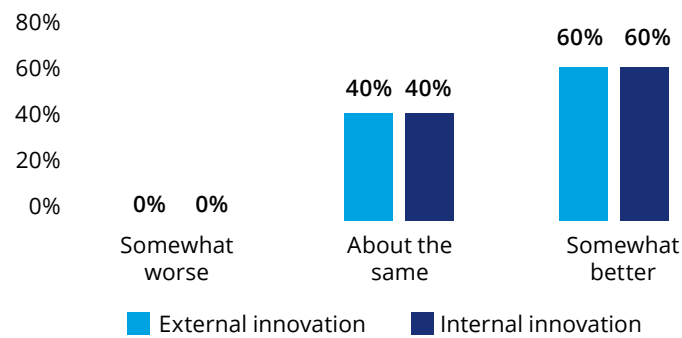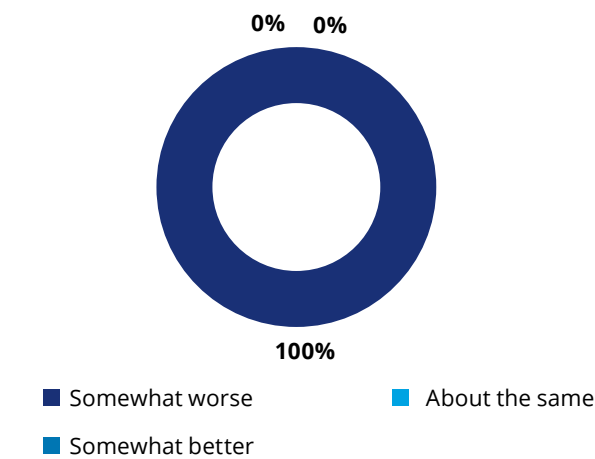

- **The leadership team had confidence in taking lead in any situation.**

Sector 7: IT

Performance

- **To what extent, the lockdown has affected your ability to serve your customers (internal / external) satisfactorily.**

0%
33%
67%

- Somewhat worse
- About the same
- Somewhat better

- **To what extent, the pandemic has affected the organisation's ability to innovate externally and internally.**

100%
67%
33%
0%   **0%**   **0%**

| | Somewhat worse | About the same | Somewhat better |

- External innovation
- Internal innovation

- **To what extent, employee productivity has been affected due to the remote working situation.**

0%
33%
67%

- Somewhat worse
- About the same
- Somewhat better

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**

Not observed: 0%
Somewhat prevalent: 0%
Very prevalent: 100%

- **We continuously explored new opportunities and pushed boundaries of risk.**

Not observed: 0%
Somewhat prevalent: 67%
Very prevalent: 33%

- **We worked in a morphed team structure and were intentionally collaborative.**

Not observed: 0%
Somewhat prevalent: 33%
Very prevalent: 67%

- **We were closely involved with our customers with a real-time exchange of information to provide services/ products on demand.**

Not observed: 33%
Somewhat prevalent: 0%
Very prevalent: 67%

- **The decision-making authority was increasingly lowered to front-line employees.**

Not observed: 33%
Somewhat prevalent: 0%
Very prevalent: 67%

- **We were comfortable in dealing with ambiguity, and encouraged to experiment, fail early, and fail fast.**

Not observed: 0%
Somewhat prevalent: 33%
Very prevalent: 67%

Leadership

- **The leadership team grasped the situation's complexity and was able to pre-empt difficult situations/crisis.**

80%	**67%**
60%	
40%	**33%**
20%	
0%	**0%**
	Not observed	Somewhat prevalent	Very prevalent

- **The leadership team was able to take quick decisions in a rapidly changing scenario.**

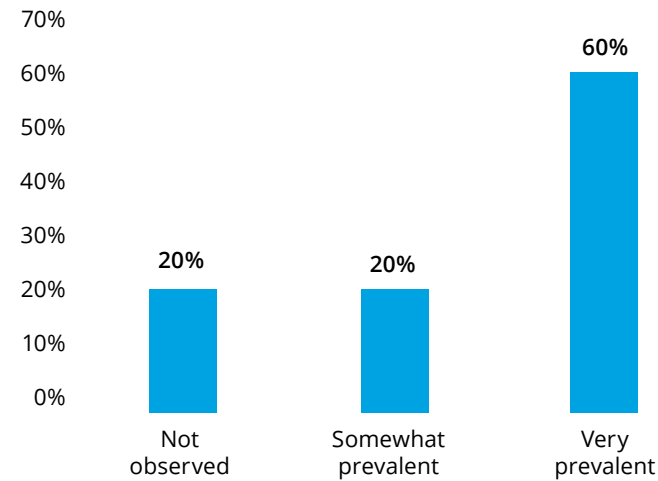|	
80%	**67%**
60%	
40%	**33%**
20%	
0%	**0%**
	Not observed	Somewhat prevalent	Very prevalent

- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**

80%	**67%**
60%	
40%	**33%**
20%	
0%	**0%**
	Not observed	Somewhat prevalent	Very prevalent

- **The leadership team had a relentless desire to excel, even in the most demanding situations.**

80%	**67%**
60%	
40%	**33%**
20%	
0%	**0%**
	Not observed	Somewhat prevalent	Very prevalent

- **The leadership team displayed mental toughness, and perseverance in difficult times and rapidly changing situations.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	33%	67%

- **The leadership team was able to collaborate seamlessly with different stakeholders.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	0%	100%

- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

	Not observed	Somewhat prevalent	Very prevalent
	0%	67%	33%

- **The leadership team had confidence in taking lead in any situation.**

	Not observed	Somewhat prevalent	Very prevalent
	33%	67%	0%

Sector 8: Others

Performance

- **To what extent, the lockdown has affected your ability to serve your customers (internal/external) satisfactorily.**

0%   0%

100%

■ Somewhat worse   ■ About the same

■ Somewhat better

- **To what extent, the pandemic has affected the organisation's ability to innovate externally and internally.**

■ External innovation   ■ Internal innovation

- **To what extent, employee productivity has been affected due to the remote working situation.**

0%

40%

60%

■ Somewhat worse   ■ About the same

■ Somewhat better

Culture

- **Our organisation provided clarity on our purpose, and 'why' we are doing 'what' we are doing.**

- **We continuously explored new opportunities and pushed boundaries of risk.**

- **We worked in a morphed team structure and were intentionally collaborative.**

- **We were closely involved with our customers with a real-time exchange of information to provide services/ products on demand.**

- **The decision-making authority was increasingly lowered to front-line employees.**

- **We were comfortable in dealing with ambiguity, and encouraged to experiment, fail early, and fail fast.**

Leadership

- **The leadership team grasped the situation's complexity and was able to pre-empt difficult situations/crisis.**

- **The leadership team was able to take quick decisions in a rapidly changing scenario.**

- **The leadership team was able to view the situation from a different perspective, and come up with alternate ideas and plans.**

- **The leadership team had a relentless desire to excel, even in the most demanding situations**

- **The leadership team displayed mental toughness, and perseverance in difficult times and rapidly changing situations.**

- **The leadership team was able to collaborate seamlessly with different stakeholders.**

- **The leadership team displayed an appetite to understand and accept new perspectives, and ways of thinking and working.**

- **The leadership team had confidence in taking lead in any situation.**

Endnotes

1. https://www.hindustantimes.com/world-news/countries-ease-curbs-even-as-global-COVID-cases-top-3-5-million/story-STZQs9Bb0ZlapdITM9RtaN.html

2. https://edition.cnn.com/2020/05/14/health/coronavirus-endemic-who-mike-ryan-intl/index.html

3. Deloitte, The heart of resilient leadership: Responding to COVID-19, 2020. https://www2.deloitte.com/us/en/insights/economy/COVID-19/heart-of-resilient-leadership-responding-to-COVID-19.html

4. Holly Secon and Aylin Woodward, "A comprehensive timeline of the new coronavirus pandemic, from China's first COVID-19 case to the present," Business Insider, March 20, 2020.

5. International Labor Organization, "As job losses escalate, nearly half of global workforce at risk of losing livelihoods," press release, April 29, 2020

6. MIT Sloan- Deloitte Digital Report 2018

7. MIT Sloan- Deloitte Digital Report 2015

8. Deloitte Digital DNA Playbook

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