



The worker-employer relationship disrupted

If we're not a family, what are we?

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Foreword: The social enterprise tested

OVER THE PAST three years, we've written about the evolution of organizations from business enterprises to social enterprises that listen to, invest in, and actively shape the world around them. The term social enterprise reflected a new reality that organizations were increasingly being judged on the basis of their relationships with their workers, their customers, and their communities. No longer just a good idea, it became an expectation that organizations would not only generate a profit and return to shareholders but would do so while improving the lot of stakeholders within and outside of their four walls.

But what we didn't anticipate was that the pandemic would put organizations' relationships with one particular stakeholder group—the workers who make everything happen—to such a profound and stringent test. As public health, economic, and social movements demanded quick, decisive, and consequential organizational action, organizations' commitment to the social enterprise's principles were deeply challenged.

Some organizations embraced those principles. Anheuser-Busch InBev called its workforce to action through a global working group called “Ideas for Good,” aimed at operationalizing ideas that could aid the communities in which they work.¹ NASA brought the power of their

engineering workforce to the table when their Jet Propulsion Laboratory engineers designed a high-pressure ventilator for coronavirus patients and the agency quickly sought and obtained FDA approval.² And Voya Financial and Savvi Financial teamed up to support workers, developing a planning tool for workers who were laid off, furloughed, or working reduced hours during the pandemic.³

But the story doesn't end there. Despite the positive examples of social enterprises making an impact during COVID-19, workers still questioned whether businesses were doing enough. In Deloitte's 2021 Millennial study, seven in 10 millennials said businesses focus on their own agendas rather than considering wider society, and less than half (47%) believed businesses have a positive impact on society.⁴

The future is uncertain, but what has never been more clear is that the social enterprise's destiny is inextricably linked with that of those it employs. As organizations recognize the centrality of their relationship with their workers to their enterprise success, they face the urgent need to be deliberate about how they manage it. Understanding the myriad ways workers and employers could engage is a fundamental need for leaders seeking to harness the workforce's potential and thrive in uncertain futures.

If we're not a family, what are we?

“Shopify, like any other for-profit company, is not a family. The very idea is preposterous. You are born into a family. You never choose it, and they can't un-family you. The dangers of 'family thinking' are that it becomes incredibly hard to let poor performers go. Shopify is a team, not a family.”

— P Tobias Lütke, CEO, Shopify

Shopify reminded workers that they're a business, not a family.⁵ Basecamp banned societal and political discussions at work.⁶ Fujitsu took the first steps to end “solo work” practices.⁷ Goldman Sachs came under fire for workers' 100 hour weeks.⁸ And Danone set its sights on becoming the world's largest B-Corp. Whatever you thought the worker-employer relationship was before, there's no doubt that it is under stress and evolving now.

What's less clear is what form it will take moving forward. How will the worker-employer relationship shift as employers and workers push and pull each other in the pursuit of their various needs? Will organizations continue to embrace their role as social enterprises? Will workers' trust in business remain steadfast, or will they look for leadership outside of organizational walls?

This special report explores one set of possible answers to the central question: *How might the worker-employer relationship evolve to meet the opportunities and challenges of the post-COVID-19 world?*

In a world full of uncertainties, we've used scenario planning to explore the possible futures of the worker-employer relationship, seeking to challenge conventional wisdom, stretch our thinking and horizons, and chart a new course. The insights on the following pages leverage our scenario planning methodology and are fueled by research findings from a combination of social media polling, live survey polling, artificial intelligence (AI)-enabled focus groups, and interviews with business and HR executives across industries and workers all over the world.

COVID-19: Testing the limits of the worker-employer relationship

The pandemic strained and tested the worker-employer relationship. Employers were called upon to support workers' health, livelihoods, and dignity to an unprecedented degree, and their success—or failure—to do so came under unprecedented scrutiny. The result was that developments that

might have played out over a period of many years were compressed into a matter of months.

Sometimes, these pressures yielded great benefits. Workers showed remarkable resilience and adaptability as they rose to the pandemic's challenges, and with their employers' support and mandate, they achieved innovative results that could otherwise have taken years to materialize. But many questions also arose about whether organizations were doing enough to support and safeguard their workers. People quickly pointed to organizations' shortcomings in protecting workforce segments that were disproportionately impacted by the health crisis and pursuant economic downturn—young workers, who were most likely to be unemployed or underemployed;⁹ minority groups, whose labor force participation steeply declined; and women, whose employment was found to be 19% more at risk than men.¹⁰ Organizations also faced backlash for their role in encouraging high-pressure working conditions. Eighty-nine percent of workers in a February 2021 global *Harvard Business Review* study said that their work life was getting worse, 85% said that their well-being declined, and 56% said that their job demands had increased.¹¹

Perhaps then it's no surprise that we find ourselves in a moment of reflection. Workers are reconsidering everything from who they want to work for—with 40% of the global workforce considering leaving their employer this year¹²—to the role they expect employers to play in supporting their purpose and values. Likewise, organizations are contemplating their role in society and their relationship with their workers—with some leaning in and others backing away.

And while the worker-employer relationship may be top of mind for both workers and executives, they may not be aligned on *how* it will evolve. Sixty-three percent of the workers we surveyed in

our research for this special report felt that their relationship with their employer will stay the same or become a stronger partnership, while 86% of executives told us they believe workers will gain greater independence and influence relative to their employers in the future.

Talent supply and government impact: Key contexts for the worker-employer relationship

Understanding how the worker-employer relationship could evolve begins with identifying which factors will have the greatest influence on the relationship moving forward. We used focus groups to get executives' perspectives on what those factors could be, discussing possibilities such as economic growth, the use of technology in business, unexpected disasters, climate change, and social divides in access to resources such as education, wealth, and health. But beyond the rest, the two factors that stood out as being the most influential on the future of the worker-employer relationship in our research were talent supply and government impact.

Talent supply: How talent availability will influence how workers seek employment and how organizations access and retain them.

The most evident impact of talent supply is the different actions that organizations or workers might take depending on how easy or difficult it is to get a job or secure an appropriately skilled worker. For instance, talent supply could influence whether organizations are likely to invest in reskilling; to what extent workers will seek changes in their employers or careers; how organizations could use the alternative workforce to access the skills and capabilities they need; and how heavily an organization might lean on technology to replace, augment, or collaborate with their workforce.

Talent supply is already a key concern and growing in importance. The pandemic exacerbated growing digital, education, and skilling divides around the globe—putting further strain on talent supply considerations and trends. In 2020, 80% of job losses were among the lowest quarter of wage earners, many of whom work in hard-hit sectors such as leisure and hospitality, government, and education.¹³ And a new study estimates that 100 million global low-wage workers will need to find a different occupation by 2030.¹⁴ At the same time, the demand for skilled workers is growing, with seven in 10 employers globally saying they are struggling to find workers with the right mix of technical skills and human capabilities.¹⁵

Government impact: How government action will affect workers’ and employers’ roles in the new world of work. In our research for this special report, government regulation rose to the top as the most influential external factor behind an organization’s and its workforce’s ability to thrive. The type, consistency, speed, and effectiveness of government action could all influence the worker-employer relationship. For instance, government effectiveness in driving social change, such as policies around worker representation or protection, or actions to address concerns such as climate change or social injustice, could shift workers’ expectations of their employers to attend to such issues. Public policy and regulation protecting jobs and wages, enhancing social safety nets and benefits, improving access to education, or investing in reskilling could decrease workers’ reliance on their employers for these things. And public policies that restrict or create an additional burden on organizations seeking to create work in new geographies, access talent across borders, or leverage alternative workforce segments could influence workforce planning and talent strategies.

We use these two factors, talent supply and government impact, to explore four potential futures that illustrate how the world of work and the worker-employer relationship could evolve:

- **Work as fashion:** In a “work as fashion” future, employers are in constant motion as they chase worker sentiments, competitor actions, and marketplace dynamics. The worker-employer relationship is **REACTIVE**: Employers feel compelled to respond in the moment to workers’ expressed preferences, and to competitor moves, without connecting those actions to a sustainable workforce strategy.
- **War between talent:** In a “war between talent” future, workers compete for limited jobs due to an oversupply of talent. The worker-employer relationship is **IMPERSONAL**: Employers view workers as interchangeable and easily replaceable, and workers are more concerned with competing with each other for jobs than with the quality of their relationship with their employer.
- **Work is work:** In a “work is work” future, workers and employers view organizational responsibility and personal and social fulfillment as largely separate domains. The worker-employer relationship is **PROFESSIONAL**: Each depends on the other to fulfill work-related needs, but both expect that workers will find meaning and purpose largely outside of work.
- **Purpose unleashed:** In a “purpose unleashed” future, purpose is the dominant force driving the relationship between workers and employers. The worker-employer relationship is **COMMUNAL**: Both workers and employers see shared purpose as

FIGURE 1

Four possible futures illustrate the range of scenarios for the worker-employer relationship



Source: Deloitte analysis.

the foundation of their relationship, viewing it as the most important tie that binds them together.

These four futures are illustrative, not exhaustive. They can be either positive or negative, depending on the choices that workers and employers make. Organizations will likely find themselves in some combination of these futures depending on the needs and expectations of their workforce, their industry, their regions, and the communities in which they operate. The increased complexity of the world requires us to abandon “one-size-fits-all” views in lieu of a more nuanced approach and understanding.

Charting your course

The narrative that follows explores each possible future in detail and outlines the risks that succumbing to its pressures could raise. In each future we offer an *instinctive response*—the path we believe most organizations would take when faced with the dynamics and conditions of that world. But the instinctive response is just that—not a conscientious strategy.

The alternative to taking the instinctive route includes actions that can allow organizations to *survive*—the basic elements that must be in place for an employer to do well in each future. Organizations that embrace a survival mindset will

be able to tread water—leveraging near-term strategies to navigate the future, with an expectation (or hope) that the world will revert to business as usual once external pressures cede. While survival strategies are important in the near term, they do not give an organization the tools they need to chart their own destiny for longer-term success.

Moving beyond a survive mindset to a *thrive* mindset requires a recognition that disruption is continuous rather than episodic, and a willingness to use disruption as a catalyst to drive the organization forward. The 15% of the 3,630 executives in our 2021 Global Human Capital Trends research who said their organization was very prepared for COVID-19 were already adopting a thrive mindset. This could be especially important as organizations consider the future of their relationship with workers, since those who adopted a thrive mindset¹⁶ were three times more likely than their peers to bring human strengths to

the fore—leveraging worker adaptability and mobility to navigate disruption.

In these futures, you will read about how organizations can take a greater leap to ideas and practices that may seem unconventional or aspirational, but that can be essential to an organization’s ability to build purpose and meaning in work, unleash the potential of the workforce, and employ new perspectives.

As you read on, challenge yourself to avoid concluding that the coming years will accelerate the changes you already expected or believed were inevitable. Instead, imagine how the future might assume a different course—and how you might address the opportunities and challenges that future course might present. As Peter Drucker famously said: “The greatest danger in times of turbulence is not the turbulence itself, but to act with yesterday’s logic.”



Work as fashion

IN A “WORK as fashion” future, employers are in constant motion as they chase worker sentiments, competitor actions, and marketplace dynamics.

The worker-employer relationship is REACTIVE: Employers feel compelled to respond in the moment to workers’ expressed preferences, and to competitor moves, without connecting those actions to a sustainable workforce strategy.

The “work as fashion” future is transitory and constantly changing. It’s akin to how brands introduce new clothing collections seasonally and cyclically, moving them rapidly from runway to retail to capture consumers’ fleeting attention and desires. It’s a self-perpetuating cycle in which the latest trends substitute for a sustained strategy. Even an employer’s stance on societal issues is used primarily as a way to attract, retain, and motivate workers, adopting the purpose that’s currently hot in a bid to keep the workforce engaged.

Conditions that could lead to the “work as fashion” future

A “work as fashion” future could arise from the convergence of low talent supply and low government impact.

A low talent supply creates a seller’s market for workers, especially for skilled workers. Workers can base their choice of employer on what each is offering and how well those offerings meet their immediate desires. Employers, meanwhile, become acutely attuned to their workforce’s preferences, as well as what their competitors are doing, to compete for workers’ attention and approval. It’s a mirror image of the “war between talent” future, in which workers compete for employers’ attention and approval.

Low talent supply is already a reality in many industries and geographies today. A Korn Ferry



Source: Deloitte analysis.

analysis estimated a global talent deficit of 85.2 million workers by 2030, predicting a skills shortage that could result in US\$8.452 trillion in unrealized annual revenue.¹⁷ Many companies large and small are struggling to find enough workers amid the economy’s rapid recovery from the pandemic-spawned recession.¹⁸ A recent study in Japan revealed that 79% of Japanese companies are concerned about the shortage of talent.¹⁹ In the United States, there were 8.1 million vacant job openings in March 2021—a record high. Further exacerbating the problem, the study showed that there were approximately half as many available workers per open job when compared to a historical 20-year average.²⁰

Low government impact can also help create the conditions for this future. When government does not offer support what workers feel they need, such

as access to health care, workplace protections, and reskilling opportunities, workers will expect employers to provide what they’re not getting elsewhere—and because they have the upper hand, they are in a position to demand it.

We see Work as Fashion as possibly 2021’s and 2022’s dominant future, especially in light of the hotly debated issue of the return to the workplace. A case in point: After initially planning to mandate an “office-first” environment as the pandemic subsides, Amazon now says that it will allow most office workers to work remotely two days a week. It’s likely that this move reflects the fact that flexibility has become “table stakes in tech, where competition for talent is always fierce.”²¹ These types of situations led a recent *New York Times* article to observe, “For the first time in a generation, workers are gaining the upper hand.”²²

SIGNALS THAT THE FUTURE COULD BE HEADED TOWARD “WORK AS FASHION”

- Increased employer reliance on worker surveys and other listening tools.
- Increased employer activity in measuring themselves against competitor and industry benchmarks, and of adjusting practices to align to benchmarks.
- Continuous changing and rollout of worker programs and policies.
- Increased external marketing of worker incentives.
- New levels of social activism from employers.

Transitory solutions can create several risks, including:

- **What matters first may trump what matters most.** Moving too quickly to address worker sentiment doesn't allow employers time to explore deeper root causes behind workers' expressed feelings and needs. For instance, if employers treat meaning and purpose mainly as attraction and retention tools, they may overlook that what workers are actually looking for is consistency and a more sustained commitment. They may also miss the opportunity to use purpose to cultivate belonging among the workforce and thereby improve their performance.
- **Diverse voices are drowned out.** Employers who prioritize speed of response may not take the time to examine whether the way they collect and interpret their data promotes an equitable environment. Many people hold unconscious biases that reinforce prevailing but discriminatory social values, and this may affect the way they develop and execute organizational workforce strategies. In many organizations, diverse individuals are underrepresented to begin with. Listening efforts may not be designed to adequately capture their views. And even if employers manage to avoid this difficulty, diverse

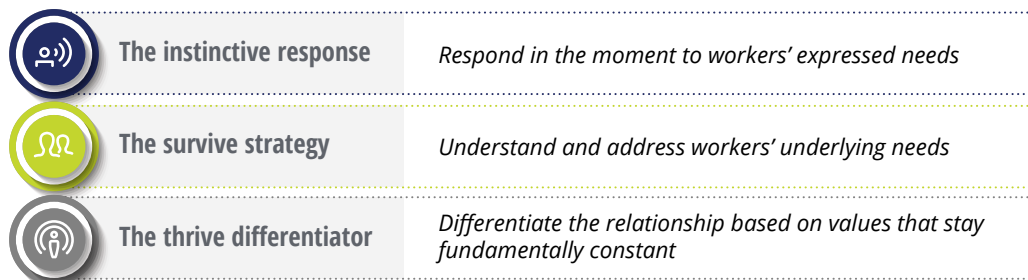
Navigating the “work as fashion” future

THE INSTINCTIVE RESPONSE

The instinctive response in a “work as fashion” future is to be highly responsive—constantly listening to workers and reacting at speed. But this approach can mislead employers into substituting responsiveness for a relationship. A productive long-term relationship between workers and employers must have a deeper basis than responding to the loudest and most recent voice.

FIGURE 2

Choices for navigating the “work as fashion” future



Source: Deloitte analysis.

CASE IN POINT: PING-PONG TABLES

Despite the popularity over the past decade of bringing ping pong tables into the workplace as a means to build a fun workplace culture, less than a quarter of millennials surveyed at the height of this trend said that an informal work environment is extremely important to them when looking for a job. Instead, the group favored other factors such as the opportunity to learn and grow, the quality of their manager or management, and their interest in the type of work.²³

populations' views may be ignored as outliers if they systematically diverge from those of the majority.

- **Listening becomes surveillance.** Using technology to understand the workforce may cross the line into worker surveillance, raising potential risks around data privacy. The pandemic may have increased this risk by accelerating employers' adoption of listening and monitoring tools. More than one out of four companies purchased new technology during the pandemic to passively track and monitor their workers,²⁴ and 95% of IT leaders increased the frequency of worker listening since COVID-19 began.²⁵
- **Differentiation gets lost in competition.** Trying to match or one-up competitors' actions can devolve into a copycat strategy that results in a race to the middle or, even worse, the bottom. And when every employer is matching what competitors are doing to "make the sale" to workers, their offerings lack differentiation. Worker loyalty may last only until someone else offers them incrementally more compensation, training, or other incentives that have come to be commodities.

THE SURVIVE STRATEGY

Employers in a "work as fashion" future will need to go beyond simple responsiveness to gain a competitive edge. Survival in this future entails being thoughtful, action-oriented, and selective. Ways to accomplish this include:

- **Dig deeper.** Ask nuanced questions that get at more basic issues of concern to the workforce than their desires in the moment. In our 2020 Global Human Capital Trends research, we discussed the importance of asking better questions that guide organizations to better results. Examples of those questions include why workers leave, not just who might leave; whether diverse populations wield organizational influence, not just whether the population is diverse; and how workers across the entire workforce ecosystem are treated, not just how full-time employees are treated.²⁶
- **Walk the talk.** In a "work as fashion" future, workers want to see that their employer is actually doing what it has promised them, not just talking about it. A June 2021 survey of US workers found that 55% felt that leadership only addressed racial justice by writing or speaking about it, not by taking action.²⁷ Leaders should be prepared to highlight the organization's actions in areas that have been identified for changes, clearly communicating what the priorities are and how the organization is addressing them now. This could be a significant challenge for organizations, with 80% of respondents in our executive focus groups saying that leadership readiness will be the biggest internal barrier to their ability to achieve their future strategies.
- **Focus empowerment where it matters most.** Most workers want to be empowered where it matters most, which is in the work they do and how to advance their careers. By

providing internal mobility via opportunity marketplaces, employers may be able to satisfy workers' desire for empowerment by putting them in control of their careers. As the 2020 Deloitte-MIT *Future of the workforce* study noted, "One of the most significant research takeaways for top management is that opportunity marketplaces both demand and elicit agency—the perceived ability to influence one's future—and fundamentally flip a perennial top talent and workforce management question."²⁸

CASE IN POINT: GIVING WORKERS AGENCY THROUGH AN OPPORTUNITY MARKETPLACE

Schneider Electric decided to implement an internal opportunity marketplace when it found that almost half the employees who left the organization did so because they felt it was difficult for them to find future growth opportunities within the company. The marketplace is used not to dictate career paths but to enable employees to take the initiative and own their careers. According to Andrew Saily, Schneider's vice president of Talent Digitization, Employer Branding and University Relations: "We've always told our employees that they own their careers, that they are in the driver's seat."²⁹ Besides surfacing reskilling and upskilling opportunities, the company's AI-based platform can guide workers to projects that align with their own purpose and goals.³⁰

THE THRIVE DIFFERENTIATOR

Being thoughtful and selective in responding to worker needs is necessary, but it's not sufficient to thrive in this future. For that, employers need to build a sustainable and differentiated worker-employer relationship built around a core set of ideals that are important to both the worker and the employer. A sustainable relationship is one that lasts through shifts in worker sentiment and

marketplace conditions, evolving with the times but always tying back to fundamentally constant values. And a differentiated relationship is one that is uniquely tailored to appeal to the workers the organization most needs to engage, regardless of what competitors are doing.

Waste Management is an example of an organization that is successfully considering its workers' broader needs. Most recently, the company has demonstrated this by focusing on a perennially important issue: the ability to pay for a college education. After hearing from their employees how much of a burden this was, Waste Management launched "Your Tomorrow," an education and upskilling program in partnership with Guild Education, in April 2021. Not only does the program offer the company's nearly 36,000 US employees access to more than 170 fully funded programs—including undergraduate and graduate degrees, short-term technology and business certificates, and high school completion³¹—but the company is planning to expand it to cover its employees' nearly 34,000 benefits-eligible dependents, including children and spouses, as well. As Tamla Oates-Forney, chief people officer for Waste Management, said, "It didn't take long for us as a company to realize that [extending "Your Tomorrow" to families as well as employees] would be a key differentiator for us": a commitment to workers that is an enduring part of the organization's style.³²

A sustainable, differentiated relationship is only partly about benefits, policies, and programs. Rather, it extends the consideration of worker needs to the broader workforce experience. Everything from well-being, personal and professional growth, and meaningful work is on the table. The relationship also can't be one-sided. For an employer to be able to address the entire workforce experience, it needs to have an ongoing conversation with workers about what is important to them and why it matters. The point is to engage

workers in a dialogue that gives the employer insight into what truly drives them, and that gives workers a meaningful voice about these deeper values.



In a “work as fashion” future, the pressures to respond and keep up with the pack can lead to an organization chasing its own tail as it instinctively responds to workers’ immediate requests and desires. Going past that entails being deliberate about where to invest in the employer brand, and creating a sustainable, differentiated relationship that grounds the worker-employer relationship in

“Fashion is what you’re offered four times a year by designers. Style is what you choose.”

— *Lauren Hutton*

consistent and mutually valued ideals. Doing this makes an employer a trend setter in a world of fashion followers. As actress Lauren Hutton observed: “Fashion is what you’re offered four times a year by designers. Style is what you choose.”



War between talent

IN A “WAR between talent” future, workers compete for limited jobs due to an oversupply of talent. **The worker-employer relationship is IMPERSONAL: Employers view workers as interchangeable and easily replaceable, and workers are more concerned with competing with each other for jobs than with the quality of their relationship with their employer.**

The “war between talent” future takes a mechanistic, supply-chain view of talent. It’s the embodiment of Taylorism, the embrace of scientific management to increase economic efficiency and labor productivity. In applying this approach to factory workers, Taylor is said to have deconstructed each job into the specific motions it required, determined which of these motions were essential, and timed workers’ execution with a stopwatch—all in the name of increasing the ratio of output to input.³³

Conditions that could lead to the “war between talent” future

A combination of high talent supply and low government impact could create favorable conditions for a “war between talent” future.

It’s self-evident how a high talent supply can contribute to this future. When the market is awash with qualified workers, employers can find and retain workers simply because they are desperate for employment. High salaries, attractive benefits, and a positive work environment are less necessary than in the “work as fashion” future, where employers compete for scarce workers by continually adjusting their programs around workers’ expressed needs.

Low government impact would further exacerbate this dynamic. Labor laws and social safety nets in a “war between talent” future would be minimal or



Source: Deloitte analysis.

absent, unlike in a “work is work” future, where government worker protections are high. Regulations to limit employers’ ability to fire workers, set standards for minimum wages, keep jobs onshore, or require employers to provide a certain level of benefits will likely be spotty at best. Government-supported worker training and education programs would also be limited, exacerbating employers’ lack of investment in reskilling.

The result could be a free-for-all among employers to see who can take fullest advantage of the government’s lack of impact to reduce labor costs. Even today, we are seeing examples of employers lobbying governments to limit worker protections, a phenomenon that is playing out in regulations relative to gig workers around the world. And when workers operate outside the regulatory framework altogether, as do “ghost workers” who perform atomized tasks on an ad hoc basis, they are subject

to poor working conditions and low incomes more often than not.

SIGNALS THAT THE FUTURE COULD BE HEADED TOWARD “WAR BETWEEN TALENT”

- Organizations put limited investment into developing their talent.
- The amount of gig and fractional work, including ghost work, is growing.
- Organizations’ AI and automation initiatives focus on using technology to replace workers.
- Organizations increase their use of offshoring.
- The proportion of people funding education out of their personal resources is increasing.

Navigating the “war between talent” future

THE INSTINCTIVE RESPONSE

The instinctive response to this future is to take the mechanistic view of talent to the extreme. Under this view, employers don't just treat workers as interchangeable; they treat them as commodities, cogs of fixed value in which it is pointless to invest. The focus is not on “human” but on “resources,” with the prevailing employer ethos being to tap into those resources as cheaply and efficiently as possible. Employers pursuing this response will focus on accelerating trends that allow them to get work done in the most efficient way possible: globalize and offshore for labor arbitrage, digitize and automate to reduce headcount, and lean heavily on the alternative workforce to avoid the costs of employing people full time. They will also minimize investments in areas such as retention and reskilling: Because labor is so plentiful and cheap, these types of investments seem not worth making.

However, treating workers as commodities—eliminating investment in workers because it's seen as an unnecessary cost—has long-term consequences that may be hard to undo. Leaders may assume that marketplace conditions and business needs will not shift, talent will always be

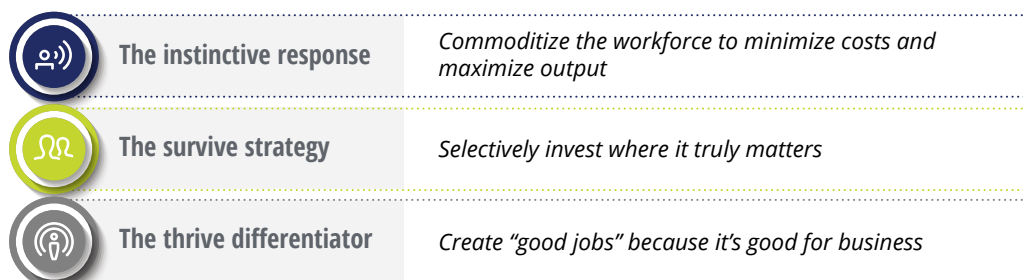
plentiful, and the skills and capabilities one needs today will be the same as will be needed tomorrow. But that's not the future we know is coming. Marketplace disruption has been accelerating for years. The pandemic brought this point home in a very big way: Sixty-four percent of the executives in our 2021 Global Human Capital Trends research said they need to be prepared for multiple, unlikely high-impact events, compared to just 29% before the pandemic.³⁴ A case in point: In the United States, the unemployment rate fell from almost 15% in April 2020 to 5.8% in May 2021, taking us from an oversupply to an undersupply of talent in a matter of months.³⁵

The certainty of change makes the instinctive response possibly the riskiest strategy in a disruptive world. These risks could include:

- **Workers are here today, gone tomorrow.** As the environment shifts, so do the capabilities an enterprise needs, and with them, the worker segments that add the most value. Today's commodity workers may be tomorrow's essential workers, hotly pursued and empowered with greater choice. A case in point: Grocery store workers, who had been considered a highly commoditized workforce segment, became essential workers overnight during the pandemic. In response, employers scrambled to offer additional pay, enhanced

FIGURE 3

Choices for navigating the “war between talent” future



Source: Deloitte analysis.

leave policies, and decreased store hours to retain them in a time of high need.³⁶

- **Innovation is stifled at the source.** Engaged, motivated workers look for opportunities to improve the way things are done, identifying unseen intersections that drive enhanced innovation. Workers who know they are viewed as commodities, however, are not likely to be engaged and motivated, damaging an organization's competitiveness as a result.
- **Certain roles go from "hard to fill" to "impossible to fill."** When employers do not invest in reskilling, workers are thrown upon their own resources to reskill themselves. This means that only the privileged few who already have the means to do so—both time and money—will be able to acquire newer skills that are in higher demand. This could lead to a dearth of qualified candidates with hard-to-find skills even in a large labor pool. And the need for new skills is already intense. Fifty-three percent of executives in our 2020 Global Human Capital Trends research expected that between half and all of their workforce would need to reskill by 2023 to provide the capabilities needed at that time.³⁷
- **The social divide becomes a social chasm.** Workers who can afford to invest in their own reskilling will be in a position to command higher compensation, while others without the resources to reskill will be left behind. The result could be an increasing gap between society's haves and have-nots. As one of the executives in our spring 2021 focus groups observed: "[A social divide means] the weaker and less skilled will be left behind unless specific measures are adopted to support them." And the social divide is an organizational issue. Seventy-two percent of executives in our focus groups agreed that social divides driven by investment patterns in education could impact their future workforce strategies.

- **Stakeholders question the organization's investment in them.** Today's talent world is highly transparent. Workers are vocal about the way they are treated and the investments, or lack thereof, their employers make to support them. If an organization's resulting employer brand is negative, customers, investors, and the general public may at least wonder whether its failure to invest in its workers suggests a failure to invest in its products and services as well.

THE SURVIVE STRATEGY

Commoditizing workers and competing on cost is a clear temptation in a "war between talent" future, but this should likely be done with caution. While cost management is important, an employer can pull ahead of others by making selective workforce investments in the areas that are most important to the organization. Actions to consider include:

- **Onboard with expediency.** Onboarding remains one of an organization's most complex processes. If an employer needs to do it often, it pays to make the processes as streamlined and effective as possible. We expect this to be especially true as postpandemic economies reopen, with employers hiring more than 6.1 million workers in April 2021 alone in the United States.³⁸ Workers who can get up to speed quickly on organizational culture and workflows will be more productive sooner, whether they are entirely new or being moved to new roles.
- **Invest where talent is scarce.** Employers can compete on cost for roles that are easy to fill. But even in a world with an aggregate talent oversupply, there will likely be "spot markets" where talent and skills are highly contested. Modern tools and analytics can allow employers to not only identify such spot markets today, but predict where those spot markets might exist in the future. Using this insight effectively means employers should be prepared to make investments in identifying, attracting, developing, and retaining top talent in these areas.

CASE IN POINT: USING LABOR DEMAND ANALYTICS TO SOURCE DATA CENTER TALENT

Facing competition in hot growth markets for data center talent, a data storage organization sought to understand the competitive talent landscape and skills trends for technicians and engineers to differentiate their talent strategy. Leveraging global labor demand data and localized supply data, they developed insights for HR leaders and hiring managers around data center hiring trends, talent availability, and differentiating skills in the market. Based on the insights generated, the organization shifted its talent strategy to attract more outside-of-industry talent, re-focus job postings around the future-focused skills necessary to open their newest data center, and built a strategic talent framework to help define when the organization should engage contingent labor vs. employees.

- **Mitigate turnover costs.** No matter how easy it is to replace workers, employers will still incur the cost of bringing those replacements up to speed, creating an incentive to retain workers who are hard to find and to train. And when workers do leave, it's important not to burn bridges. Again, today's commodity worker could be tomorrow's essential worker.

THE THRIVE DIFFERENTIATOR

The strategy for thriving in a “war between talent” future revolves around recognizing that workers deliver more value when they are respected and invested in. This may sound counterintuitive given that employers in this future view workers as interchangeable—but just because workers are interchangeable doesn't mean they can't be motivated to work harder and perform better. Even in a market with excess labor supply, investing in

workers across the board will produce disproportionately better results. And if those investments include reskilling, it will better prepare employers for the future as well.

One way to enhance worker performance through investment is to create a “good jobs” environment in which job quality is high, workers have a voice, and the employer offers training and skill development.³⁹ The motive is not altruism: Research shows that employers where “good jobs” prevail—jobs with higher wages, better hours, more predictable schedules—reap financial gains that put them ahead of competitors with less “good” jobs.⁴⁰ This was as true back in 2012, when the recent Great Recession had spawned a glut of unemployed workers,⁴¹ as it is today, when a “good jobs” strategy continues to give organizations that adopt it a competitive edge.⁴²

Though it's important, there's more to creating a good job than paying workers more. According to MIT researcher and author Zeynep Ton, “The economist's [view is that] if you pay more, you attract a better talent pool, and then they work harder and that's the outcome. But what I found in my research was [also that] companies designed the jobs in a way that enabled their employees to be more productive and contribute more to the company's success.”⁴³ Actions such as authorizing front-line workers to independently resolve customer problems, or giving on-the-ground workers the license and mandate to identify improvement opportunities, are examples.

An example of a “good jobs” strategy that makes particular sense in a “war between talent” future is to develop education and career paths to move workers from areas of talent oversupply to areas of talent undersupply. Some retailers today are doing

CASE IN POINT: GOOD JOBS AT QUIKTRIP AND MERCADONA

QuikTrip, a US-based gas station/convenience store chain, and Mercadona, Spain's largest supermarket chain, are two “good jobs” companies featured in Ton’s book *The Good Jobs Strategy*. Both stores pay store associates above-average wages, invest in training them, and empower them to solve problems on their own, including making merchandising decisions.⁴⁴ The strategy is paying off for both companies. The cost of QuikTrip’s higher wages is offset by cost reductions elsewhere in the organization.⁴⁵ And during the Great Recession of 2008 and 2009, Mercadona was able to cut prices by 10%,⁴⁶ a move that has been attributed to greater worker productivity due to its “good jobs” environment.⁴⁷

this by, for example, retraining cashiers to work in their health clinics. To support this kind of reskilling, employers can evaluate potential in their candidates and hire for it, even for commoditized jobs.



Thriving in a “war between talent” future may be a matter of focusing on improving outcomes instead of reducing costs. And improving outcomes means adopting strategies that motivate and develop workers—not for its own sake, but because it produces better results than strategies that commoditize workers. Though employers may

have a slew of workers to choose from, those toward the “good jobs” end of the spectrum will be able to increase those workers’ value to the organization, and this will empower them to move ahead of the competition. Actor and amateur boxer Chuck Zito may have said it best: “You treat me good, I’ll treat you better.”

“You treat me good, I’ll treat you better.”

— *Chuck Zito*



Work is work

IN A “WORK is work” future, workers and employers view organizational responsibility and personal and social fulfillment as largely separate domains. **The worker-employer relationship is PROFESSIONAL: Each depends on the other to fulfill work-related needs, but both expect that workers will find meaning and purpose largely outside of work.**

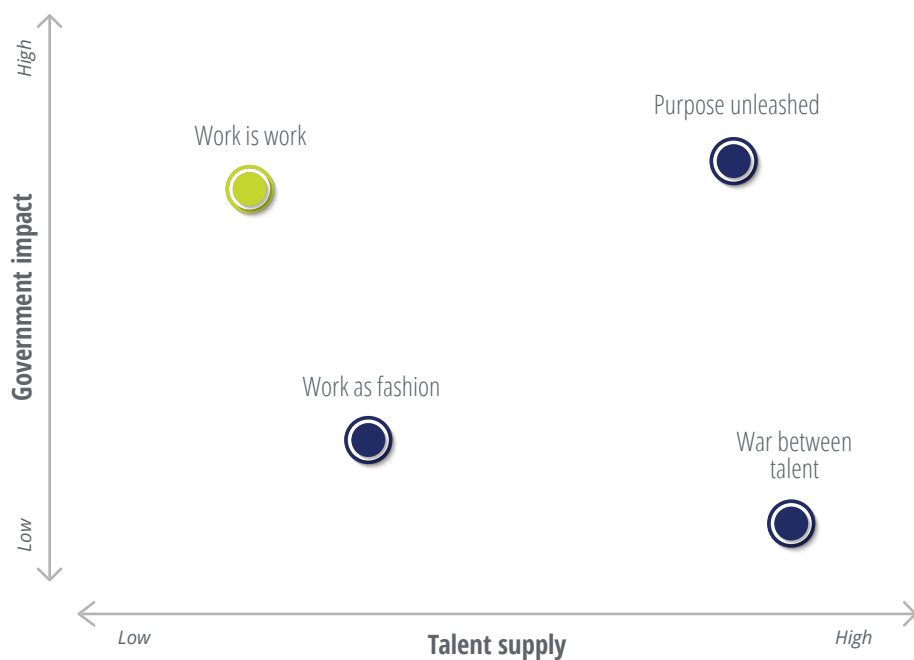
To be clear, workers still care about work in this future. In the context of their employment, they conscientiously do their jobs, and they expect their employer to provide fair compensation, paths to advancement, and learning and growth opportunities. What is less important is the degree to which people expect to find work fulfilling. People care about work and strive to perform well because it provides a livelihood and the means to pursue outside-of-work priorities. They see the rewards they gain from work—such as financial stability and time off—as enablers that allow them

to pursue fulfillment elsewhere. They look to sources such as government, interest groups, and nonprofits to help advance their societal and community agendas, while turning to sources such as family, friends, and communities for emotional connection.

Conditions that could lead to the “work is work” future

Low talent supply combined with high government impact could set the stage for a “work is work” future.

The pandemic led many workers to reflect deeply on what they need from work and from their employers, and in a world with low talent supply, workers are in a position to have employers respect those needs. And many workers may well have realized that their primary need is to place a



Source: Deloitte analysis.

Deloitte Insights | deloitte.com/insights

certain distance between work and “life.” One reason for this may be the psychological impact of the pandemic. The frequent experience of working overtime to pick up the work of laid-off colleagues, or of suddenly feeling “always on” because of the workplace invading the home, has given many workers a new appreciation of finding space to invest in one’s personal interests and passions. In fact, the *New York Times*’ April 2021 feature “Welcome to the YOLO—You Only Live Once—economy” pointed out that many workers, “burned out and flush with savings” after a year-plus of the pandemic, are reevaluating their priorities and dedicating themselves to their passions, even if it means taking a professional risk.⁴⁸

Growing evidence of health consequences of work may also lead workers to rethink their relationship with their jobs. A May 2021 World Health Organization study concluded that working 55

hours or more per week is “a serious health hazard.” The study noted that between 2000 and 2016, heart disease deaths associated with working long hours increased by 42%, and stroke deaths by 19%.⁴⁹ In certain parts of Asia, some workers are actively revolting against the pressure to “work themselves to death” by adopting an ethos of “lying flat”—a movement that espouses lying down, both literally and metaphorically, instead of joining the “rat race” of professional advancement.⁵⁰ In fact, well-being has been steadily rising in importance: Eighty percent of executive respondents in our 2020 Global Human Capital Trends research said that well-being was important or very important to their organization’s success, making it the top-ranked trend for that year.⁵¹

High government impact in the “work is work” future could reinforce this sense of detachment by lessening workers’ dependence on employers. In

this future, government effectively addresses citizen needs such as health care, retraining, and even social justice—things that workers might otherwise expect from their employers. Workers who feel less of a personal or communal risk in terms of their own employability or seeing social justice done may feel less of a need to push their employers to address those issues.

The ability to psychologically separate work from “life” could be especially strong under governments that enact strong worker protections such as a universal living wage or “right to disconnect” legislation.⁵² Several European countries have already enacted such legislation, and Ireland has even enacted a “code of practice” extending the right to disconnect to cover remote work.⁵³ Indeed, one 2019 *Harvard Business Review* article noted that the desire to find fulfillment in work is lower in European countries, whose governments are generally more active in worker-focused regulation,

than in the United States, where worker protections are less prevalent.⁵⁴

Navigating the “work is work” future

THE INSTINCTIVE RESPONSE

The instinctive response to a “work is work” future is to do nothing—to assume that the worker-employer relationship is fine and that no effort is needed to strengthen it. Operating under this assumption, employers would do little to build connections with workers or imbue the work with purpose and meaning, because they believe that the compartmentalization of work versus social and personal concerns means that the latter have no place in work. The approach is to simply avoid rocking the boat, confident that workers understand that when they're at work, they're there to work and nothing more.

CASE IN POINT: GOVERNMENT INVESTMENT IN RESKILLING

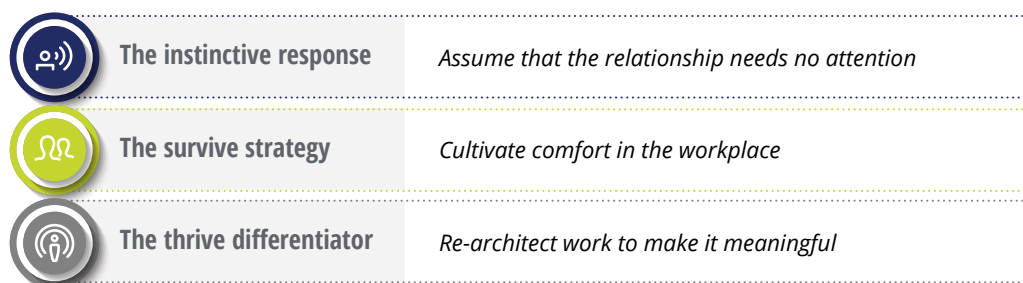
One interesting area to watch will be the role governments play in growing skills shortages around the world. In our 2020 Global Human Capital Trends research, 73% of our 9,000 global respondents identified organizations as the entity in society responsible for workforce development—far exceeding the responsibility of individuals themselves (54%) or governments (10%). Yet despite this expectation, only 16% of our respondents expected their organization to make a significant investment increase in this area and only 17% believed they could to a great extent anticipate the skills they would need in the next three years.⁵⁵

As organizations find themselves unprepared to take sole responsibility for these mounting skills crises, some governments are stepping up to help. For instance, SkillsFuture Singapore (SSG) is a government-funded movement that provides Singaporeans with learning credits to empower citizens with access to education, training, and reskilling. SSG even offered aid to employers in hard-hit sectors during the COVID-19 pandemic. In 2020, 540,000 individuals and 14,000 enterprises benefitted from SkillsFuture programs.⁵⁶

Similarly, in April 2021, England refreshed its government-sponsored training program to offer qualified individuals a free, fully funded college course. The refreshed program also makes higher education loans more flexible, allowing people to “space out their study across their lifetimes, take more high-quality vocational courses in further education colleges and universities, and to support people to retrain for jobs of the future.” The government also committed to invest more than £1.5 billion in college buildings and facilities.⁵⁷

FIGURE 4

Choices for navigating the “work is work” future



Source: Deloitte analysis.

If this view sounds familiar, it’s because it’s the way society has thought about work until the last decade. People considered the separation between work and life to be clear-cut and immutable. Organizations competed on “scalable efficiency,” pursuing standardization and economies of scale to push costs ever lower. In behavioral science terms, employers saw workers as “econs,” rational agents who would always gravitate toward maximal gain, rather than “humans,” beings with biases and

emotions that play an enormous role in their decision-making.⁵⁸ This led many organizations to deemphasize the emotional component of the worker-employer relationship, an approach that we now know is suboptimal for engagement and performance.

A “let it be” attitude toward the worker-employer relationship may seem like the rational and obvious course in a “work is work” future, but it can raise several risks:

SIGNALS THAT THE FUTURE COULD BE HEADED TOWARD “WORK IS WORK”

- Workers are increasing their use of benefits that enable outside-of-work activities, such as sabbaticals and paid time-off.
- Workers are putting in less overtime and spending fewer hours at work.
- More employers are proactively communicating guardrails around what is and is not acceptable work behavior.
- Governments are becoming more active in addressing citizen needs and enacting worker protections.
- Membership in nonprofits and other social impact organizations is increasing.
- Worker participation declines in employer-sponsored nonwork-focused programs.

- **Easier said than done.** Maintaining the separation between the professional and the personal is often easier in theory than in practice. The assumption that workers will naturally keep their personal interests and values outside the workplace may lull employers into a false sense of security that they need not worry about workplace conflicts unrelated to work issues—only to be rudely awakened if a conflict around personal opinions or values erupts. And some workers may not want to work for an organization that makes a strong delineation between personal and professional objectives. After Coinbase announced that the company would adopt an “apolitical culture” and not debate causes or political issues unrelated to work, represent personal beliefs externally, or take on activism outside of their core mission at work, the company lost 5% of its workforce.⁵⁹

- **A compromised external brand.** Employers that assume that separating the professional from the personal also entails separating the enterprise from social purpose may risk weakening stakeholder trust. A shared social purpose may not be very important to workers' relationship with their employers in this future, but it may be very important to customers and investors who want to know where the organization stands. Eighty-six percent of global respondents in 2021 Edelman Trust research expect CEOs to publicly speak out about societal challenges.⁶⁰ And the 2021 Axios-Harris Poll 100, which ranks US organizations for their reputation in the marketplace, noted that organizations "with a clear point of view and that deliver not only great products but also an impact on society" ranked at the top of the list.⁶¹
- **Suboptimal performance.** Just because workers pursue personal fulfillment outside of work doesn't mean they shouldn't feel comfortable at work or connected to their leaders and teams. Ninety-three percent of respondents in our 2020 Global Human Capital Trends research agreed that belonging drives organizational performance—one of the highest rates of consensus we've seen in a decade of this study. Organizations that fail to encourage this can miss out on the enhanced adaptability, resilience, and innovation that these elements can bring. A lack of belonging can even lead to skills gaps: Disconnected workers can be unmotivated, unmotivated workers may not prioritize reinventing themselves, and that lack of reinvention means that workers won't be gaining the new skills that employers need to keep up in a shifting world.

THE SURVIVE STRATEGY

A survival strategy in a "work is work" future, one that mitigates the risks raised by letting the worker-employer relationship manage itself, is to help workers separate their work from their personal lives while still cultivating their sense of comfort in the workplace—creating an inclusive environment where workers feel respected and treated fairly. It's important because comfort is fundamental to establishing a sense of belonging, with 25% of the respondents to our 2020 Global Human Capital Trends research identifying comfort as the *biggest driver* of belonging.⁶² Steps to take could include:

- **Define acceptable and unacceptable workplace behavior.** There's a difference between finding one's passions outside of work and leaving one's personal views and opinions outside of work. Leaders in this future may need to step in more than they might expect to maintain a harmonious environment. The ground rules for discussions among workers will need to be thoroughly thought out and clearly drawn. Managers and leaders at every level will need appropriate tools and training to defuse situations where workers clash because they have crossed the line between their work responsibilities and their outside-of-work beliefs. And organizations will need to think very carefully about how to manage workers' self-expression at work without treading on their rights. One example of an attempt to manage workplace conflict by limiting discussion of outside-of-work concerns is the software company Basecamp's ban of workers from discussing politics on company social media boards. CEO Jason Fried explained: "[Political discussions are] a major distraction. It saps our energy, and redirects our dialogue towards dark places. It's not healthy, it hasn't served us well."⁶³

- **Make everyone feel like they belong.** Even in a “work is work” future, individual workers have preferences that need to be met. In our research for this special report, 68% of executives agreed that workforce strategies will be more customized in the future to individual needs. Establishing belonging through comfort requires organizations to create an environment where workers can represent both their authentic selves and their unique needs to their employers.

CASE IN POINT: FOCUSING ON UNDERSERVED WORKFORCE SEGMENTS

A broader understanding of workforce needs could include looking at workforce segments that have traditionally been underserved or overlooked. Unilever is providing a leading example in their reimagining of employment models that will serve a broader set of worker preferences. In a new program called “U-Work,” Unilever is giving its workers “the freedom and flexibility associated with contract roles with the security and benefits typically linked to permanent roles.” Unilever employees who participate in U-Work do not have fixed roles but work on assignments. They get paid for each assignment but are free to do other things that are important to them between assignments. These U-Work workers receive a monthly retainer and are offered company benefits—whether they’re actively working on an assignment or not.⁶⁴

THE THRIVE DIFFERENTIATOR

Beyond these baseline tactics, gaining a greater competitive advantage in a “work is work” future depends on one paramount factor: motivating workers based on the merits of the work alone. Organizations that thrive will design work in ways that engage workers, so that workers do not shortchange work in favor of their outside-of-work priorities. The goal is to encourage workers to feel as

invested in their work as they are in their personal lives so that they are inspired to do their best.

To accomplish this, re-architecting work to bring out human strengths becomes critical. When organizations design work with a primary focus on cost and treat workers as “econs,” they leave very little room for workers to bring human strengths such as relationship-building, creativity, and innovation to the fore. But when organizations shift their focus toward value and ultimately meaning, they create space for workers to unleash their potential at work in ways that benefit both the organization and the workers themselves. This means designing work so that workers know that their discretionary effort matters, their contributions to work outcomes are visible and meaningful, and that the work itself gives them the chance to grow professionally. In this way, work becomes connected not just to economic goals but to psychological satisfaction as well.

Making workers feel like their contribution matters takes the feeling of belonging beyond comfort. In our 2020 Global Human Capital Trends research, a plurality of our executive survey respondents (44%) identified contribution as the biggest driver of belonging at their organization.⁶⁵



One way to show workers the value of their contributions is to emphasize outcomes in performance management, since outcomes speak more directly to a worker's contributions toward organizational objectives. There's evidence that the shift toward outcome-based performance management is already underway. More than 65% executives in our research for this special report agreed that they believed metrics would need to shift from capturing outcomes rather than outputs in the next five years. Executives also thought that outcome measures would also need to capture what workers want and value, not just the organization's wants and values—outcomes such as well-being, diversity, and growth in skills.



A “work is work” future is not without its challenges. The re-architecture of work around human principles is of prime importance, since it's the work itself that matters most in strengthening the worker-employer relationship.

“Work hard at work worth doing.”

— *Teddy Roosevelt*

The biggest competitive advantage will accrue to employers that can make work engaging enough to inspire workers to do their best. As US president Teddy Roosevelt once said: “Work hard at work worth doing.”



Purpose unleashed

IN A “PURPOSE unleashed” future, purpose is the dominant force driving the relationship between workers and employers. **The worker-employer relationship is COMMUNAL: Both workers and employers see shared purpose as the foundation of their relationship, viewing it as the most important tie that binds them together.**

In this future, purpose is so important that it trumps the importance of the work itself. The centrality of purpose to employers’ relationships with workers pushes organizations further toward stakeholder capitalism, where social concerns and business concerns—purpose and profit—are equally important. An organization’s commitment to purpose becomes critical to its employment brand: It shapes everything from its ability to attract and retain workers to the extent to which workers experience meaning and fulfillment in their employment.

PURPOSE IS AN ORGANIZATION’S NORTH STAR

Purpose grounds organizations in a set of values, a North Star, that do not depend on circumstance. Those values, which sit at the intersection of economic, social, and human interests, serve as a benchmark against which actions and decisions can be weighed. In the face of circumstances that are difficult to predict and plan for, organizations that are steadfast in their purpose are able to infuse meaning into work to mobilize workers around common, meaningful goals.⁶⁶

There’s evidence that this future could already be emerging. Over the past two years, 44% of millennials and 49% of Gen Zs said they have made choices over the type of work they are prepared to do and the organizations for which they are willing to work based on their personal ethics.⁶⁷ In our research for this special report, when we asked

executives what workers will increasingly value in the next five years, 86% predicted that they would value a meaningful mission and an opportunity to make an impact on that mission. One respondent observed: “An organization’s stance on key issues such as race, climate change, and others will become key components of the employee value proposition.” And purpose is important to worker engagement too: A recent Gartner survey found that when an organization acted on today’s social issues, the proportion of workers who were considered highly engaged increased from 40% to 60%.⁶⁸

Conditions that could lead to the “purpose unleashed” future

Organizations that see two forces in play—high talent supply and high government impact—may be operating in a “purpose unleashed” future.

When talent supply is high, employers can pick and choose workers not just for skills and capabilities, but for alignment with the organization’s purpose as well. Doing this adds an extra layer of commitment and connection to the worker-employer relationship, which can motivate workers to work harder and perform better on behalf of their employers.

High government impact supports employers’ ability to go “all in” on purpose. When the government deploys funding, resources, and other levers to address weighty issues of importance, it frees employers from obligations that might otherwise have been left to them to address. This in turn allows employers to design their own purpose agenda and pursue it with a singular focus, without being distracted by pressures to meet more basic needs. High government impact could also give organizations more opportunity to advance their purpose agenda in collaboration with government, further embedding it in everything they do.



Source: Deloitte analysis.

SIGNALS THAT THE FUTURE COULD BE HEADED TOWARD “PURPOSE UNLEASHED”

- Workers, customers, regulators, and interest groups are requesting or mandating new purpose-aligned measures from employers.
- Purpose is showing up in job descriptions, hiring practices, and performance metrics.
- Organizations are taking stances, internally and externally, on issues they otherwise may have stayed silent about in response to growing demands from workers and customers.
- Strengthening both purpose and business is a stated criterion for leadership positions and driving key executive promotion/succession decisions.
- Increased depth and transparency of reporting on purpose-driven outcomes.

so that workers know what the employer is offering them. Communicating one’s purpose and the importance of that purpose becomes the number-one priority. Employers may appoint a chief purpose officer (CPO), make visible investments into their area of purpose, or build their marketing and PR campaigns around purpose as a way to not only build its external brand but to engage current and potential future workers.

However, this response may turn purpose into a surface-level activity, with communication outweighing commitment. This raises a number of risks:

- **Suspicious of greenwashing become the order of the day.** Employers may assume that delivering a loud message around purpose is enough to satisfy workers’ expectations. But if that message is overstated, it may become impossible to live up to it, and workers could start to question the organization’s sincerity. Meanwhile, the organization’s external brand suffers because customers, investors, and the public also perceive it as insincere.
- **Public statements may have unintended consequences.** When communication and visibility are top priorities, leaders may not take the time to think carefully about the implications of what they’re communicating.

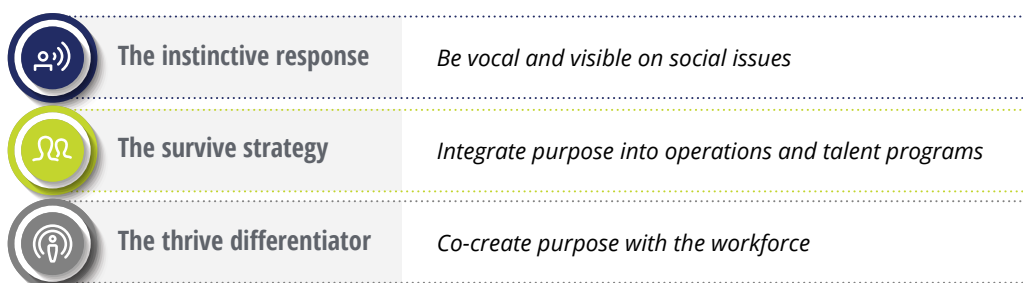
Navigating the “purpose unleashed” future

THE INSTINCTIVE RESPONSE

When an employer’s relationship with workers revolves around purpose, the instinctive response might be to take vocal and visible stances on issues

FIGURE 5

Choices for navigating the “purpose unleashed” future



Source: Deloitte analysis.

CASE IN POINT: PERCEPTIONS OF GREENWASHING

Following the death of George Floyd last year, 53% of US workers said their companies made public commitments to address racial justice and equity issues. Today, 61% of those workers say their companies have not fulfilled all of their commitments. When asked about specific actions taken, the majority said the commitments have largely materialized through verbal and written messages (40%), whereas far fewer can point to dedication of company resources (27%); engaging customers, partners or suppliers in issues (23%); or allowing employee-run company events and campaigns (21%).⁶⁹

Committing an organization to a stance may raise workers'—and the marketplace's—expectations to act accordingly. If those actions get in the way of an organization's fundamental goals, it may be stuck between a rock and a hard place, unable to either back away from its public commitments or act on those commitments to its stakeholders' satisfaction.

- **Some workers are pushed to the fringes.** Overcommunicating one's response to social or political issues could isolate workers who do not agree with it. This could exclude others who are not aligned and become a source of division, not a source of community. Workers who feel marginalized could begin to question whether they belong at the organization at all.
- **Purpose becomes a prison.** Like everything else, an organization's purpose may need to evolve with the times. But the situation can devolve quickly if workers think their employer is "all in" with them on a specific issue and the organization has to modify its position. Without adroit management, this can lead to disillusionment and discord among the workforce, and the disruption can spread to external stakeholders as well.

THE SURVIVE STRATEGY

As organizations shift from shareholder to stakeholder capitalism, their world becomes increasingly complicated and challenging. So, too, does the worker-employer relationship. To survive when this relationship is founded on purpose, an

organization needs to live and breathe purpose; to integrate purpose into all that it is and everything it does. This doesn't mean solving every societal problem or insisting that workers agree with every decision. But it does mean incorporating communal values and aspirations into every part of running the business: its operating model, governance structure, supply chain, recruitment and development programs, and marketing. This, not just external action, is what will convince workers that the organization's commitment to purpose is genuine.

Employers can take several actions to help them do this well:

- **Incorporate purpose into core talent programs.** Make sure purpose is reflected in the organization's core talent programs: benefits and policies, measurement and performance management, recruitment and retention, and learning and development. The aim is to make sure the organization's values come clearly through in the way workers are treated.
- **Model commitment to purpose.** Workers look to their leaders for clarity and expect them to model commitment to purpose. It can't be the first thing leaders jettison when the road gets bumpy. In fact, 67% of executives in our focus groups told us that their organizational measurements and metrics will evolve over the next five years to take societal goals, and things such as internal and external community

involvement and impacts to well-being and diversity and inclusion, into account. Yet when asked about the biggest internal barrier to achieving their future strategies, 80% pointed to leadership readiness.

- **Clearly communicate real, tangible progress.** Backing up statements of purpose with action is a powerful force in solidifying the worker-employer relationship. But action only helps an organization’s relationship with workers when workers know about it. Everyone in the organization needs to see, hear, and understand that the organization’s commitment to purpose is real—and not just from seeing it in the media, but from understanding the behind-the-scenes effort and investment that goes into it.

THE THRIVE DIFFERENTIATOR

Organizations that engage their workers as co-creators of their purpose will be positioned to go beyond surviving to thriving. This is because co-creation—giving workers a meaningful voice in both defining and executing the organization’s purpose—elicits a sustainable sense of loyalty and connection that inspires workers to perform at their best. Co-creation goes beyond merely soliciting workers’ input; rather, it’s about workers having influence and decision rights over what the organization stands for, what outcomes it wants to achieve, and what actions it takes to pursue those outcomes. It’s about collaborating to find ways to build purpose into the work, tying purpose into what workers do every day. And it’s about encouraging a “creator’s mindset” in which workers know they have the agency to actively shape the organization’s purpose and feel highly invested in the organization as a result.⁷⁰

Employers can pursue co-creation with workers in several ways, such as forming worker councils or “action committees,” or inviting workers to define success metrics. One way to give workers decision rights is to involve them in board discussions or even to name them to the board of directors

outright. Delta Air Lines, for instance, convenes a team of on-contract employees who are invited to attend board meetings.⁷¹ Representing workers on boards could help organizations make purpose-driven decisions that help realize a financial benefit as well. A study of 560 public European companies shows that those where employees “have a seat on the supervisory board” do better than those that do not, including in operating profits, capital market valuation, employment development, and investments in capital assets and research and development.⁷²

There’s a caveat, though. Both workers and employers must be committed to sharing decision-making power in real and meaningful ways. If workers have only a token say, and if leaders resist giving workers influence over decisions, efforts toward co-creation can be useless if not actively harmful. An illustrative case is the initial success and subsequent decline of one large company’s employee stock option (ESOP) plan. Marketplace value and employee engagement skyrocketed in the ESOP’s first year, during which workers actively participated with management in making day-to-day decisions. But the company’s workers and leaders had a long history of clashing with each other—and when they slid back into old behavior patterns, employee morale and company performance plummeted.⁷³



CASE IN POINT: COCREATION WITH WORKERS AND ECOSYSTEMS

Anheuser-Busch InBev (AB InBev) demonstrated co-creation with workers during the pandemic, when the organization quickly mobilized organizational resources to answer their communities' immediate needs. The company asked employees to submit "ideas for good," aligned to the company's purpose and core principles, to aid the communities in which they worked. The idea to use AB InBev's breweries to make hand sanitizers and to use its plastic injection molding machines to make private protective equipment for health care workers were two ideas born out of this program.

AB InBev is also taking an ecosystem approach to its social efforts, taking action to help clean the water they source to produce their beer, supporting the financial well-being of farmers whose crops they source, and helping make safe beer with indigenous crops for consumption in local communities. In this way, their aim is to operate in their ecosystems in a symbiotic manner, growing together with their suppliers, consumers, and communities instead of apart.⁷⁴

Perhaps most important of all, employers should recognize that they still operate in a disruptive world. As a result, they will have to evolve their purpose to navigate a growing, evolving portfolio of complicated social, environmental, and marketplace issues. In a cocreative environment, this will require constant reengagement and renegotiation between workers and employers, which is a fundamental departure from the traditional worker-employer relationship.



Organizations that want to truly unleash purpose—to propel themselves forward through a purpose-based relationship with their workers—have to do *more*. Leaders must understand that being vocal about their purpose is not enough, and that advancing purpose through external action is

only half the battle. Workers who know that purpose matters, that it guides their employer's attitudes and interactions with them every single day, and that they have a voice not just in providing feedback but in shaping the organization's path forward will bring the best of their passions to bear on their employer's success. Says Starbucks' Howard Schultz: "When you're surrounded by people who share a passionate commitment around a common purpose, anything is possible."

"When you're surrounded by people who share a passionate commitment around a common purpose, anything is possible."

— Howard Schultz

Setting direction in a world of uncertain futures

The worker-employer relationship has no single future, only a multitude of possibilities. But examining the question in light of what *could* happen can help us better chart a course toward our chosen destination, the place where we ultimately want the worker-employer relationship to go. Without a clear course, without a point on the horizon to aim for, strategies for the evolution of the worker-employer relationship risk running in circles.

It's hard to think about choosing a future destination when the here and now is so tumultuous. Yet it's essential to look up from in-the-trees tactical concerns and the pressures of short-term survival to consider broader priorities and a longer timeframe. There's more to nurturing a productive relationship with workers than the immediate question of how much flexibility to offer. And figuring out how to bring people back to the workplace is not the same as creating a sustainable workforce strategy. Building a worker-employer relationship that empowers an organization to thrive depends first and foremost on a clear, compelling vision for differentiating and sustaining that relationship.





What principles can help guide employers toward that vision? In our 2020 Global Human Capital Trends report, we called on organizations to embed the three attributes of *purpose*, *potential*, and *perspective* into their organizational DNA. It's now time to embed

those attributes into the *human* aspect of work, into all the ways that employers and workers engage with each other. What would the worker-employer relationship be like at an organization that imbues every aspect of work with purpose and meaning every day? How would it look at an organization that designs and organizes work to maximize the human potential for thinking, creating, and doing? What kind of relationship could foster a perspective that embraces a future orientation, asking not just how to optimize for today, but how to create value tomorrow, integrating our work, our lives, and our communities?

Again, there's no single answer to these questions. Purpose, potential, and perspective may manifest in many different ways in different futures (figure 6). But at a deeper level, all of these manifestations share many common threads. Leadership, belonging, meaning, empowerment, the re-architecture of work—all these and more play into building a sustained, differentiated worker-employer relationship in any future. Most of these themes are not new. They have been evolving, as has the relationship between employers and workers over time. But in an unpredictable world, it's the ability to apply purpose, potential, and perspective in whatever future comes to pass that positions an organization to thrive.

FIGURE 6

Purpose, potential, and perspective can be created in any future

	Work as fashion 	War between talent 	Work is work 	Purpose unleashed 
Purpose	<i>Anchor the relationship in values that do not change</i>	<i>Build a foundation of respect and dignity for all workers, all work, and the human needs we all have</i>	<i>Make work meaningful so workers can see how their contributions tie to the larger whole</i>	<i>Give workers a meaningful voice in defining and executing the organization's purpose</i>
Potential	<i>Design careers for choice and opportunity</i>	<i>Invest in worker skills for the good of the organization</i>	<i>Use work as a means to develop human capabilities that would otherwise remain untapped</i>	<i>Foster a culture and work environment where workers can grow and bring their ideas and passions to further business and social goals</i>
Perspective	<i>Define the worker experience around the areas that can drive true competitive differentiation</i>	<i>Create a worker experience designed for future talent needs</i>	<i>Center the worker experience around the work itself</i>	<i>Make purpose the core tenet of the worker experience and talent brand</i>

Source: Deloitte analysis.

In a moment of choice and consequence, setting a bold destination for all organizational strategies—business, workforce, and social—is vital. The challenge before us now is to choose, with empathy

and a deep understanding of what is possible, where that destination lies on both the current horizon and the next, and to navigate toward it with a steady hand.

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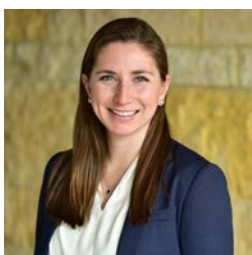
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