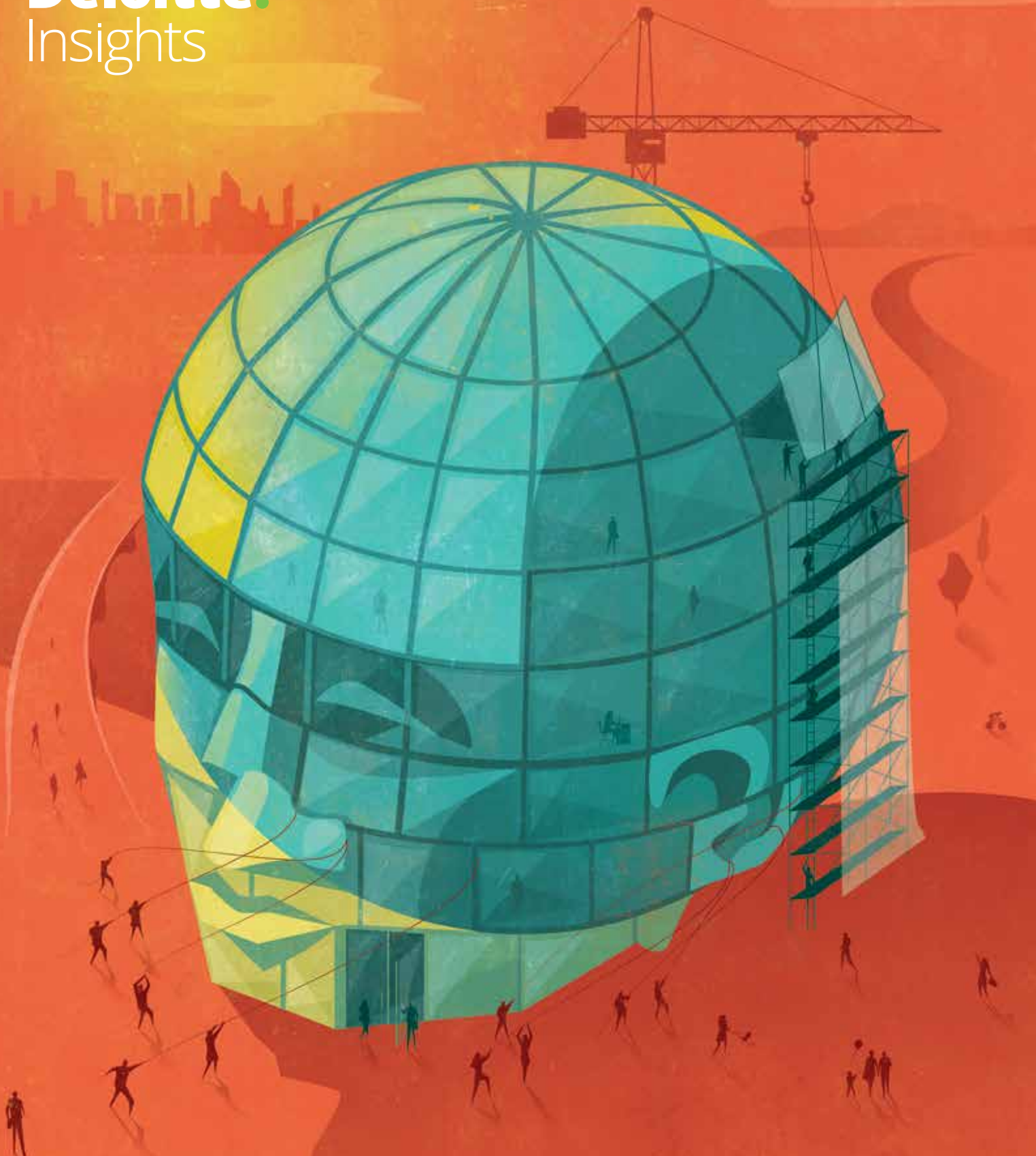


**Deloitte.**  
Insights



# The rise of the social enterprise

2018 Deloitte Global Human Capital Trends



Experience Deloitte's  
*Global Human Capital Trends* like never  
before. Access the new HC Trends  
app featuring exclusive content.

Deloitte's Human Capital professionals leverage research, analytics, and industry insights to help design and execute the HR, talent, leadership, organization, and change programs that enable business performance through people performance. Visit the Human Capital area of [www.deloitte.com](http://www.deloitte.com) to learn more.

# This year's 10 trends

The 2018 Deloitte Global Human Capital Trends report, drawing on a survey of more than 11,000 HR and business leaders globally, describes the emergence of the social enterprise as a response to heightened societal expectations and rapid technological change—and the human capital implications for organizations to address today.



## THE SYMPHONIC C-SUITE: TEAMS LEADING TEAMS

Senior leaders can't afford to work in silos in today's complex, dynamic environment. The goal is to act as a symphony of experts playing in harmony—instead of a cacophony of experts who sound great alone, but not together.



## THE WORKFORCE ECOSYSTEM: MANAGING BEYOND THE ENTERPRISE

The composition of the workforce is changing dramatically. As alternative work arrangements become more common, how can organizations appeal to, engage with, and drive value through workers of all different types?



## NEW REWARDS: PERSONALIZED, AGILE, AND HOLISTIC

Why have rewards remained stuck in the past, when almost every other aspect of HR has undergone transformative change? Leading companies are now undertaking the hard work of creating personalized rewards programs based on understanding each individual's needs.



## FROM CAREERS TO EXPERIENCES: NEW PATHWAYS

Rather than an orderly, sequential progression from job to job, 21st-century careers can be viewed as a series of developmental experiences, each offering the opportunity to acquire new skills, perspectives, and judgment.



## THE LONGEVITY DIVIDEND: WORK IN AN ERA OF 100-YEAR LIVES

People are living longer, and organizations are shifting their attitudes toward older workers as a result. Organizations that can turn advancing worker age into an asset could gain a competitive advantage.



## CITIZENSHIP AND SOCIAL IMPACT: SOCIETY HOLDS THE MIRROR

Stakeholders today are taking an intense look at organizations' impact on society, and their expectations for good corporate citizenship are rising. In an effort to meet these expectations, leading organizations are making citizenship a core part of their strategy and identity.



## WELL-BEING: A STRATEGY AND A RESPONSIBILITY

Many employers are putting in place innovative programs for financial wellness, mental health, healthy diet and exercise, mindfulness, sleep, stress management, and more. The aim? To both increase worker productivity and meet new social expectations.



## AI, ROBOTICS, AND AUTOMATION: PUT HUMANS IN THE LOOP

As AI and other advanced technologies permeate the workplace, skills such as critical thinking, creativity, and problem-solving gain in importance. Leading companies are recognizing that these technologies are most effective when they complement humans, not replace them.



## THE HYPER-CONNECTED WORKPLACE: WILL PRODUCTIVITY REIGN?

Workplaces are being flooded with new and exciting communications tools, each promising to improve productivity. But management must still make important decisions about which tools to use and how to use them—including, perhaps, the decision not to use certain tools at all.



## PEOPLE DATA: HOW FAR IS TOO FAR?

The use of workforce data to analyze, predict, and help improve performance has exploded over the last few years. But as organizations start to use people data in earnest, new risks as well as opportunities are taking shape.





# The hyper-connected workplace

## Will productivity reign?

---

**The sheer number and variety of communications tools continues to expand, all of them promising to make workers more efficient and productive. In an effort to realize this promise, smart organizations are reshaping work practices, physical workspaces, and leadership approaches to ensure that greater connectivity means greater productivity in a network of teams.**

---

**N**EW communications tools raise a critical question for organizations: Are these tools actually increasing productivity, or is work turning into a chaotic, relentless series of messages, emails, conference calls, and chats? The move toward organizations designed around networks of teams adds a new dimension to this question.

In last year's *Global Human Capital Trends* survey, 88 percent of respondents were reorganizing their companies into a flatter, more networked team structure—2017's number-one trend. This year, if anything, this trend is reaching further into the organization. In 2018, 91 percent of respondents say that their organizations' employees spend time on projects outside their functional area, and 35 percent say that employees do so on a regular basis.

A flood of new tools is fueling this shift, each promising to give people more intelligent ways of communicating with each other. The market has attracted top tech companies such as Cisco, Microsoft, Facebook, Slack, Atlassian, and others, which have all announced new messaging, chat, and video communications systems.<sup>1</sup>

Yet this year's *Global Human Capital Trends* research uncovered a high level of anxiety about whether these new tools actually align with business goals. When asked about the productivity of the "new workplace," 47 percent of respondents said that it is a very important concern. And from an economic standpoint, the problem has become critical, as global workforce productivity growth is at its lowest rate in almost two decades.<sup>2</sup>

## The massive change underway

How is this change in workplace communication playing out? Research shows that the communications behaviors, habits, and tools that people use in their personal lives are migrating into their work lives. Consider text messaging. Today, 74 percent of our survey respondents regularly use text messaging for personal communications; worldwide, 18.7 billion text messages are sent every day, with individuals between 25–34 years old sending and receiving more than 75 texts per day.<sup>3</sup> As texting

has become ubiquitous in our personal lives, it has also become commonplace at work, and 32 percent of our survey respondents expect its use to increase.

Many believe that tools such as social media and instant messaging will follow a similar path into the workplace. In fact, our 2018 survey results were striking: 44 percent of respondents believe that face-to-face meetings will decrease in the future, and 30 percent believe that phone and text usage will decrease. To replace them, 70 percent believe that workers will spend more time on collaboration platforms, 67 percent see growth in “work-based social media,” and 62 percent predict an increase in instant messaging. No single mode of communication will be dominant; instead, the work environment will feature many different ways to communicate.

In addition, new, AI-based team management tools are starting to emerge. The newest versions of Office 365, G-Suite, and Slack now include AI-based recommendations to help individuals find the right document, respond to the right message, and understand what is most important.<sup>4</sup> One HR systems provider recently introduced a product that uses AI to read employee pulse surveys and give managers recommendations on how to improve their management style.

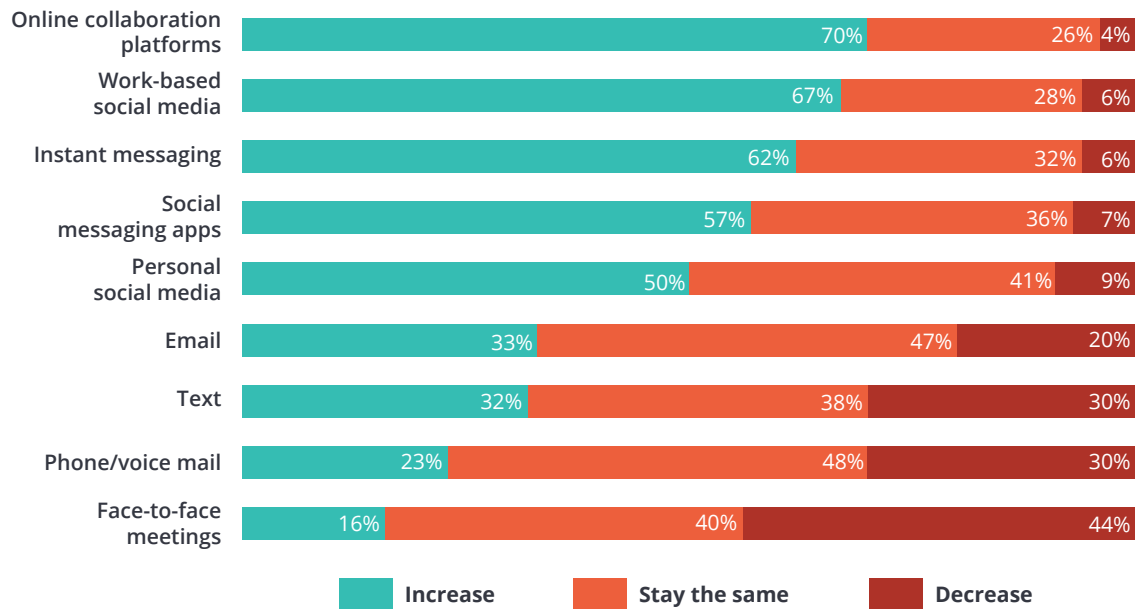
The impact of these new communications tools can be very positive. Consider how Mayo Clinic, one of the world’s leading health care organizations, has improved teamwork, information-sharing, and patient care with technology.<sup>5</sup> Through a mobile app called AskMayoExpert, physicians can

.....

**PHYSICAL MEETINGS LOSING OUT TO VIRTUAL COLLABORATION**

Face-to-face meetings and phone meetings are on the decline, while work collaboration platforms are on the upswing.

**Figure 1. Expected use of communications channels in the next three to five years**



n = 11,070

Source: Deloitte *Global Human Capital Trends* survey, 2018.

Deloitte Insights | [deloitte.com/insights](http://deloitte.com/insights)

Explore the data further in the **Global Human Capital Trends app**.

.....

find information on diagnosis, treatment, cause, and prevention from other specialists and sources in the network. Users can ask and answer questions, and all information is tagged by topic, location, care process, and key fact. This highly interactive system is now widely used, with doctors obtaining access to experts more than 10 times a day.

Or take Starbucks. Just a few months after adopting Workplace by Facebook, 80 percent of Starbucks' store managers were actively using the tool to share knowledge, best practices, and support one another.<sup>6</sup> Likewise, Walmart claims that an offering like Workplace is helping the company break down language barriers, increase knowledge-sharing, and even manage emergencies like Hurricane Harvey.<sup>7</sup>

## The importance of management choices

While 2018 will see the continued introduction and adoption of many new and exciting tools, management must still make important decisions about which tools to use and how to use them. Critically, this can often include the decision *not* to use certain tools.

Managers must determine which tools are best for their organization, teams, and tasks based on a variety of factors, including culture, pace of communication, and level of formality. For example, some companies may benefit from a wholesale leap to a collaboration tool, while others will need to retain email as a vital and valuable means of communication. Whichever tools are selected, it is important to create standards and guidelines that align individual productivity with team and organizational productivity.

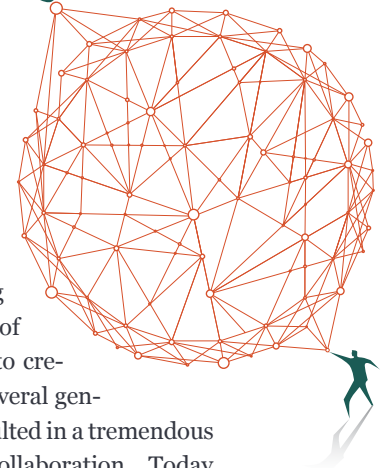
For instance, Autodesk, a leading provider of 3D design and engineering software, found that it was supporting 85 separate implementations of Slack, each used by a different team to manage work in its own unique way. While these teams were happy, there was no sharing of common best practices, and no ability to collaborate between teams.<sup>8</sup>

Managers must determine which tools are best for their organization, teams, and tasks based on a variety of factors, including culture, pace of communication, and level of formality.

Guy Martin, Autodesk's director of open source programs and team facilitation, decided it was time to "tie these teams together." The company adopted the principle to be "open by default," and convinced all 85 project teams to share their channels in one overarching enterprise implementation of Slack. This made it necessary to create naming conventions and several general usage guidelines, but it resulted in a tremendous increase in company-wide collaboration. Today, Autodesk's Slack community has more than 5,000 active members, leading to greater learning, open collaboration, and positive sharing—the ingredients needed to move away from a "collection of teams" to a "network of teams."<sup>9</sup>

## From connectivity and activity to teamwork and productivity

The proliferation of new tools and related programs is impressive. Nearly half of this year's survey respondents (46 percent) regularly use virtual meeting software, and 30 percent now use location-based videoconferencing. But greater use of communications tools by individuals does not automatically



mean increased productivity for teams and organizations. Indeed, while 71 percent of our survey respondents believed that these new tools improve their *personal* productivity, 47 percent were concerned about whether the tools are really driving productivity overall.

Our research suggests that in today's networked organizations, a combination of technology, physical space design, new leadership approaches, and new work practices must all come together to achieve this goal. This requires collaboration between HR, IT, and the business to build an integrated, customized work environment.

Adaptable and flexible workspaces are one key to enabling productivity. For example, at ING Bank and Atlassian, agile teams work in co-located workspaces with large whiteboards that show project

plans, shared goals, and project status.<sup>10</sup> Some software firms like Skype and others not only give employees private cubicles, but also lavish the workspace with gourmet cafeterias, quiet rooms, and even napping pods.<sup>11</sup> This mix of physical spaces helps people work together or privately when needed and quickly collaborate on projects.

Moving beyond thinking of personal productivity and technology tools in isolation is critical for organizations to achieve positive results. A combination of culture, leadership, and incentives needs to come together for effective collaboration and productivity to reign. To do this, HR organizations must work with IT to bring their expertise in team management, goal-setting, and employee development to help make using the new wave of connectivity tools productive, simple, and engaging.

### THE BOTTOM LINE

Companies are concerned about a potential disconnect between new communications tools and organizational goals. To help ensure that personal connectivity translates to organizational productivity, they are adapting their practices, workspaces, and leadership styles to capitalize on the power of these tools while mitigating potential negative impacts.



**Table 1. What role does the C-suite play in managing the hyper-connected workplace?  
How can individuals adjust?**

<b>CHRO</b>	Create a deliberate strategy for using collaboration and communication platforms that extends beyond the technology, considering not only what tools to use, but ways to design the work environment to take effective advantage of those tools. This could involve adjustments to the physical workspace, different management techniques, and/or rewards or incentives to shape the way people use the available tools.
<b>CIO</b>	Take an inventory of all collaboration platforms currently in place across the organization. Develop a strategy for promoting connectivity in the workplace in ways that avoid duplicating systems and apps, and provide a platform that can help drive more data and insights with regard to how people interact, engage, and collaborate with one another. Such insights can be incredibly valuable as the organization works to drive up productivity.
<b>Chief risk officer</b>	Determine what risk policies should be in place around the use of collaboration and social tools in the workplace. For example, what information should be shared via social tools versus via private emails or phone calls? Consider implementing training for the workforce on ways to use collaboration and social tools in a way that manages privacy and other related risks.
<b>Chief operations officer</b>	Consider ways to embed collaboration tools into day-to-day work processes to increase adoption and help increase productivity.
<b>Individuals</b>	Think about how you can use collaboration tools to increase your own productivity without becoming overwhelmed. Are you regularly posting to internal social groups? Are you collaborating more often and more effectively? Using these tools effectively can help you to build your personal brand by expanding your networks, sharing your expertise more broadly, or promoting your achievements to those who may otherwise not be aware of them.

Source: Deloitte analysis.

## ENDNOTES

1. Josh Bersin, *HR technology disruptions for 2018: Productivity, design, and intelligence reign*, Bersin, Deloitte Consulting LLP, 2017.
2. Trading Economics, "United States nonfarm labour productivity," accessed January 18, 2018.
3. Kenneth Burke, "73 texting statistics that answer all your questions," Text Request, May 24, 2016.
4. Josh Bersin, conversations with product executives at Microsoft, Google, and Slack.
5. Kelly Cheng, *Mayo Clinic: A case study in work environment redesign*, Deloitte University Press, June 19, 2013.
6. Stuart Lauchlan, "Digital life at Starbucks after Schultz—new CEO commits to tech innovation," *diginomica.com*, March 23, 2017.
7. Emily Price, "Facebook's Workplace takes a big step forward by adding Walmart as a customer," *Fast Company*, September 26, 2017.
8. Josh Bersin, conversation with Autodesk executives, January 2018.
9. Guy Martin (Director, Open @ ADISK, Autodesk), interview with the authors, February 8, 2018.
10. Josh Bersin, conversations with ING Bank and Atlassian executives, November 2017.
11. Josh Bersin, conversations with Silicon Valley executives.



## AUTHORS



### DIMPLE AGARWAL

Deloitte MCS Limited | [dagarwal@deloitte.co.uk](mailto:dagarwal@deloitte.co.uk)

Dimple Agarwal is the global leader of Organization Transformation and Talent for Deloitte's Human Capital practice, and also leads Deloitte Consulting's own talent agenda in the United Kingdom. She consults at the C-suite level on operating models and organizational design, HR and talent strategies, leadership strategies and development, and major transformation programs in the space of M&A, culture, and digital. In her 23 years of consulting, she has worked in the United Kingdom as well as in many Asian, African, and European countries. Agarwal holds a bachelor's degree in psychology and a master's degree in human resources.



### JOSH BERSIN

Deloitte Consulting LLP | [jbbersin@deloitte.com](mailto:jbbersin@deloitte.com)

Josh Bersin founded Bersin & Associates, now Bersin, in 2001 to provide research and advisory services focused on corporate learning. A frequent speaker at industry events and a popular blogger, he has been named one of HR's top influencers by multiple commentators. Bersin spent 25 years in product development, product management, marketing, and sales of e-learning and other enterprise technologies. He has a BS in engineering from Cornell, an MS in engineering from Stanford, and an MBA from the Haas School of Business at the University of California, Berkeley.



### GAURAV LAHIRI

Deloitte India | [gauravlahiri@deloitte.com](mailto:gauravlahiri@deloitte.com)

Gaurav Lahiri leads Deloitte India's Human Capital consulting practice. He works with clients to align their organizations with their strategic agenda, including reviewing strategies, designing organization structures, implementing talent management programs, and formulating reward strategies to drive performance and motivation. Lahiri co-authored the 2007 book *The Indian CEO: A Portrait of Excellence* and has authored several papers on post-merger integration and change management. He graduated with honors in mathematics from Delhi University and holds an MBA from the XLRI School of Management.



**JEFF SCHWARTZ**

Deloitte Consulting LLP | [jeffschwartz@deloitte.com](mailto:jeffschwartz@deloitte.com)

Jeff Schwartz, a principal with Deloitte Consulting LLP, is Deloitte's global leader for Human Capital Marketing, Eminence, and Brand and the US leader for the Future of Work. He is the US leader of the Innovation Tech Terminal (ITT), linking the Israeli start-up ecosystem with global clients. Schwartz is an advisor to senior business leaders at global companies, focusing on business transformation, organization, HR, talent, and leadership. He has lived and worked in the United States, Russia, Belgium, Kenya, Nepal, Sri Lanka, and India, and was based in Delhi and Mumbai from 2011 to 2016. He launched Deloitte's *Global Human Capital Trends* research in 2011. Schwartz has an MBA from the Yale School of Management and an MPA from Princeton's Woodrow Wilson School of Public and International Affairs.



**ERICA VOLINI**

Deloitte Consulting LLP | [evolini@deloitte.com](mailto:evolini@deloitte.com)

Erica Volini is the US Human Capital leader for Deloitte Consulting. Throughout her 20-year career, Volini has worked with some of the world's leading organizations to link their business and human capital strategies. She is a frequent speaker on how market trends are impacting HR organizations and the HR profession as a whole. Within Deloitte, she is a member of Deloitte Consulting's management committee. Volini has a bachelor of science in industrial and labor relations from Cornell University.



## GLOBAL HUMAN CAPITAL LEADERS

### Global Human Capital leader

#### Brett Walsh

Deloitte MCS Limited  
bcwalsh@deloitte.co.uk

### Global Human Capital leader, Marketing, Eminence, and Brand

#### Jeff Schwartz

Deloitte Consulting LLP  
jeffschwartz@deloitte.com

### Global Human Capital leader, Future of Work

#### Heather Stockton

Deloitte Canada  
hstockton@deloitte.ca

### Global Employment Services leader

#### Nichola Holt

Deloitte Tax LLP  
nicholt@deloitte.com

### Global Organization Transformation and Talent leader

#### Dimple Agarwal

Deloitte MCS Limited  
dagarwal@deloitte.co.uk

### Global HR Transformation leader

#### Michael Stephan

Deloitte Consulting LLP  
mstephan@deloitte.com

### Global Actuarial, Rewards, and Analytics leader

#### Darryl Wagner

Deloitte Consulting LLP  
dawagner@deloitte.com

## HUMAN CAPITAL COUNTRY LEADERS

### AMERICAS

#### Americas

##### Verónica Melián

Deloitte SC  
vmelian@deloitte.com

#### United States

##### Erica Volini

Deloitte Consulting LLP  
evolini@deloitte.com

#### Canada

##### Jeff Moir

Deloitte Canada  
jmoir@deloitte.ca

#### Argentina

##### Maria Soledad Ruilopez

Deloitte & Co. SA  
sruilopez@deloitte.com

#### Brazil

##### Roberta Yoshida

Deloitte Consultores  
royoshida@deloitte.com

#### Chile

##### Marcel Villegas

Deloitte Audit y Consult.  
marvillegas@deloitte.com

#### Colombia and Peru

##### Alejandra D'Agostino

Deloitte & Touche SRL  
aldagostino@deloitte.com

#### Costa Rica

##### Sofia Calderon

Deloitte & Touche SA  
socialderon@deloitte.com

AMERICAS (CONT.)

**Dutch Caribbean**

**Maghalie van der Bunt**

Deloitte Dutch Caribbean  
mvanderbunt@deloitte.com

**Ecuador**

**Roberto Estrada**

Andeanecuador Consultores  
restrada@deloitte.com

**Mexico**

**Tomas Fernandez**

Deloitte Consulting Mexico  
tofernandez@deloittemx.com

**Panama**

**Jessika Malek**

Deloitte Consultores  
jmalek@deloitte.com

**Uruguay, LATCO**

**Verónica Melián**

Deloitte SC  
vmelian@deloitte.com

ASIA PACIFIC

**Asia Pacific & China**

**Jungle Wong**

Deloitte Consulting (Shanghai) Co. Ltd,  
Beijing Branch  
junglewong@deloitte.com.cn

**Australia**

**David Brown**

Deloitte Touche Tohmatsu  
davidbrown@deloitte.com.au

**India**

**Gaurav Lahiri**

Deloitte India  
gauravlahiri@deloitte.com

**Japan**

**Akio Tsuchida**

Deloitte Tohmatsu Consulting Co. Ltd  
akitsuchida@tohatsu.co.jp

**Korea**

**Eric Seok Hoon Yang**

Deloitte Consulting  
seoyang@deloitte.com

**New Zealand**

**Hamish Wilson**

Deloitte  
hawilson@deloitte.co.nz

**Southeast Asia**

**Mark Maclean**

Deloitte Consulting Pte Ltd  
mmaclean@deloitte.com

EUROPE, MIDDLE EAST, AND AFRICA

**EMEA**

**Ardie Van Berkel**

Deloitte Consulting BV  
avanberkel@deloitte.nl

**United Kingdom**

**Anne-Marie Malley**

Deloitte MCS Limited  
amalley@deloitte.co.uk

**Africa**

**Pam Maharaj**

Deloitte Consulting Pty  
pammaharaj@deloitte.co.za

**Austria**

**Christian Havranek**

Deloitte Austria  
chavranek@deloitte.at

**Belgium**

**Yves van Durme**

Deloitte Consulting  
yvandurme@deloitte.com

**CIS**

**Gulfia Ayupova**

CJSC Deloitte & Touche CIS  
gayupova@deloitte.ru

**Cyprus**

**George Pantelides**

Deloitte Ltd  
gpantelides@deloitte.com

EUROPE, MIDDLE EAST, AND AFRICA (CONT.)

**Czech Republic**

**Pavel Šimák**

Deloitte Advisory s.r.o.  
psimak@deloittece.com

**Denmark and Nordics**

**Filip Gilbert**

Deloitte Denmark  
fgilbert@deloitte.dk

**East Africa (Kenya, Tanzania, Uganda)**

**George Hapisu**

Deloitte & Touche Kenya  
ghapisu@deloitte.co.ke

**Finland**

**Eva Tuominen**

Deloitte Oy  
eva.tuominen@deloitte.fi

**France**

**Philippe Burger**

Deloitte Conseil  
phburger@deloitte.fr

**Germany**

**Udo Bohdal-Spiegelhoff**

Deloitte Consulting GmbH  
ubohdal@deloitte.de

**Ireland**

**Valarie Daunt**

Deloitte & Touche  
vdaunt@deloitte.ie

**Israel**

**Maya Barlev**

Brightman Almagor Zohar & Co.  
mbarlev@deloitte.co.il

**Italy**

**Lorenzo Manganini**

Deloitte Consulting SRL  
lmanganini@deloitte.it

**Luxembourg**

**Basil Sommerfeld**

Deloitte Tax & Consulting  
bsommerfeld@deloitte.lu

**Middle East**

**Ghassan Turqieh**

Deloitte & Touche (ME)  
gturqieh@deloitte.com

**Netherlands**

**Petra Tito**

Deloitte Consulting BV  
ptito@deloitte.nl

**Norway**

**Eva Gjovikli**

Deloitte AS  
egjovikli@deloitte.no

**Poland**

**Michał Olbrychowski**

Deloitte Business Consulting SA  
molbrychowski@deloittece.com

**Portugal**

**José Subtil**

Deloitte Consultores SA  
jsubtil@deloitte.pt

**Spain**

**Joan Pere Salom**

Deloitte Advisory SL  
josalom@deloitte.es

**Sweden**

**Victor Kotnik**

Deloitte Sweden  
vkotnik@deloitte.se

**Switzerland**

**Myriam Denk**

Deloitte Consulting Switzerland  
mydenk@deloitte.ch

**Turkey**

**Cem Sezgin**

Deloitte Turkey  
csezgin@deloitte.com

**West Africa (Nigeria and Ghana)**

**Joseph Olofinsola**

Deloitte & Touche Nigeria  
jlofinsola@deloitte.com.ng

## ACKNOWLEDGEMENTS

The creation of Deloitte's 2018 *Global Human Capital Trends* report was a team effort involving many practitioners from around the globe. The report leverages not only the results of our survey of more than 11,000 business and HR leaders, but also the insights from our many Human Capital partners from their interactions with business and HR leaders throughout the year.

We would not have been able to produce this report without the energy of our dedicated team:

**Julia Epstein** and **Julie May**, who helped to lead this program from the US and Global, and their team of **Daniel Baicker**, **Tracy Martin**, and **Joycelyn Finley**, who coordinated and executed all of the program initiatives and worked tirelessly with our global team.

**Amy Farner**, who led a flawless data design and analysis effort that generated our largest response in history. Her guidance and coaching was unwavering and we are forever grateful. **Shivank Gupta** and **Mukta Goyal** for their efforts on the survey and analytics, together with their colleagues: **Udita Arora**, **Ushasi Bandyopadhyay**, **Archana Bhat**, **Saylee Bhorkar**, **Ananshi Chugh**, **Srishti Dayal**, **Ankita Jain**, **Rachit Jain**, **Bhumija Jain**, **Shruti Kalaiselvan**, **Ashish Kainth**, **Yasmine Kakkar**, **Sania Motwani**, **Sahana Nabaneeta**, **Anjali Naik**, **Divya Patnaik**, **Sangeet Sabharwal**, **Vrinda Sarkar**, **Sonia Sharma**, **Goral Shroff**, **Taneet Singh Ranhotra**, and **Manan Vij**.

**Christy Hodgson**, who drove the marketing strategy and app branding and helped to bring together how the *Human Capital Trends* story was told. Her strategic mind and flawless coordination allowed us to increase the power of the story and the company videos. **Melissa Doyle** and **Steve Dutton** for their leadership in public relations.

**Andrew Pollen** and the Deloitte Digital team who partnered with us to lead the design and development of the new HC Trends web app. **Nidal Haddad** for his executive sponsorship from Deloitte Digital.

The Deloitte Insights team that supported the report's publication, including **Junko Kaji**, who provided editorial guidance; **Sonya Vasilieff**, our Deloitte Insights art director; **Sarah Jersild**, who created the Deloitte Insights introductory video; **Alok Pepakayala**, who assisted the app development team; and **Amy Bergstrom** and **Alex Kaweck**, who led Deloitte Insights' deployment efforts.

**Sue Ostaszewski**, **Karen Miklic**, **Laura Elias**, and **Marykate Reese**, who created the marketing assets, and **Shannon Pincus**, **Caroline Regan Williams**, **Ayushi Agarwal**, **Christina Anderson**, **Maggie Godleski**, **Caroline Levy**, and **Devina Vimadalal**, who drove the development of the company videos in the app. **Deepthi Agarwal**, **Angela Ayton**, **Bob Hughes**, **Lucy Matthews**, **Reuben Paul**, and **Gloria Viedma Navarro**, who worked on the client-facing materials for this year's report.

**Mia Farnham**, **Alejandra Arrue**, and **Dany Rifkin** for their support in conducting research to support the trends.

**Jennifer Fisher**, **Michelle Machalani**, and **Susanna Samet** for providing their expertise in diversity and inclusion and in public policy.

**Jeffrey Winn** and **Elaine Loo** for providing their expertise in cyber.

**Vivek Katyal** for providing his expertise and input on the people data chapter.

**Stacey Philpot**, **Jeff Rosenthal**, and **Pushp Deep Gupta** for their expertise and input on the C-suite chapter.

**Walt Sokoll**, **Chetan Jain**, and **Leendert van der Bijl** for their expertise in the HCM technology space.

# Deloitte.

## Insights

Sign up for Deloitte Insights updates at [www.deloitte.com/insights](http://www.deloitte.com/insights).



Follow @DeloitteInsight

### **Deloitte Insights contributors**

**Editorial:** Junko Kaji, Karen Edelman, Abrar Khan, Nikita Garia, Matthew Budman, Rithu Thomas, Preetha Devan

**Creative:** Sonya Vasilieff, Molly Woodworth

**Promotion:** Amy Bergstrom, Alex Kawecki

**Artwork:** Traci Daberko

### **About Deloitte Insights**

Deloitte Insights publishes original articles, reports and periodicals that provide insights for businesses, the public sector and NGOs. Our goal is to draw upon research and experience from throughout our professional services organization, and that of coauthors in academia and business, to advance the conversation on a broad spectrum of topics of interest to executives and government leaders.

Deloitte Insights is an imprint of Deloitte Development LLC.

### **About this publication**

This publication contains general information only, and none of Deloitte Touche Tohmatsu Limited, its member firms, or its and their affiliates are, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your finances or your business. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

None of Deloitte Touche Tohmatsu Limited, its member firms, or its and their respective affiliates shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

### **About Deloitte**

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more about our global network of member firms.

Copyright © 2018 Deloitte Development LLC. All rights reserved.  
Member of Deloitte Touche Tohmatsu Limited