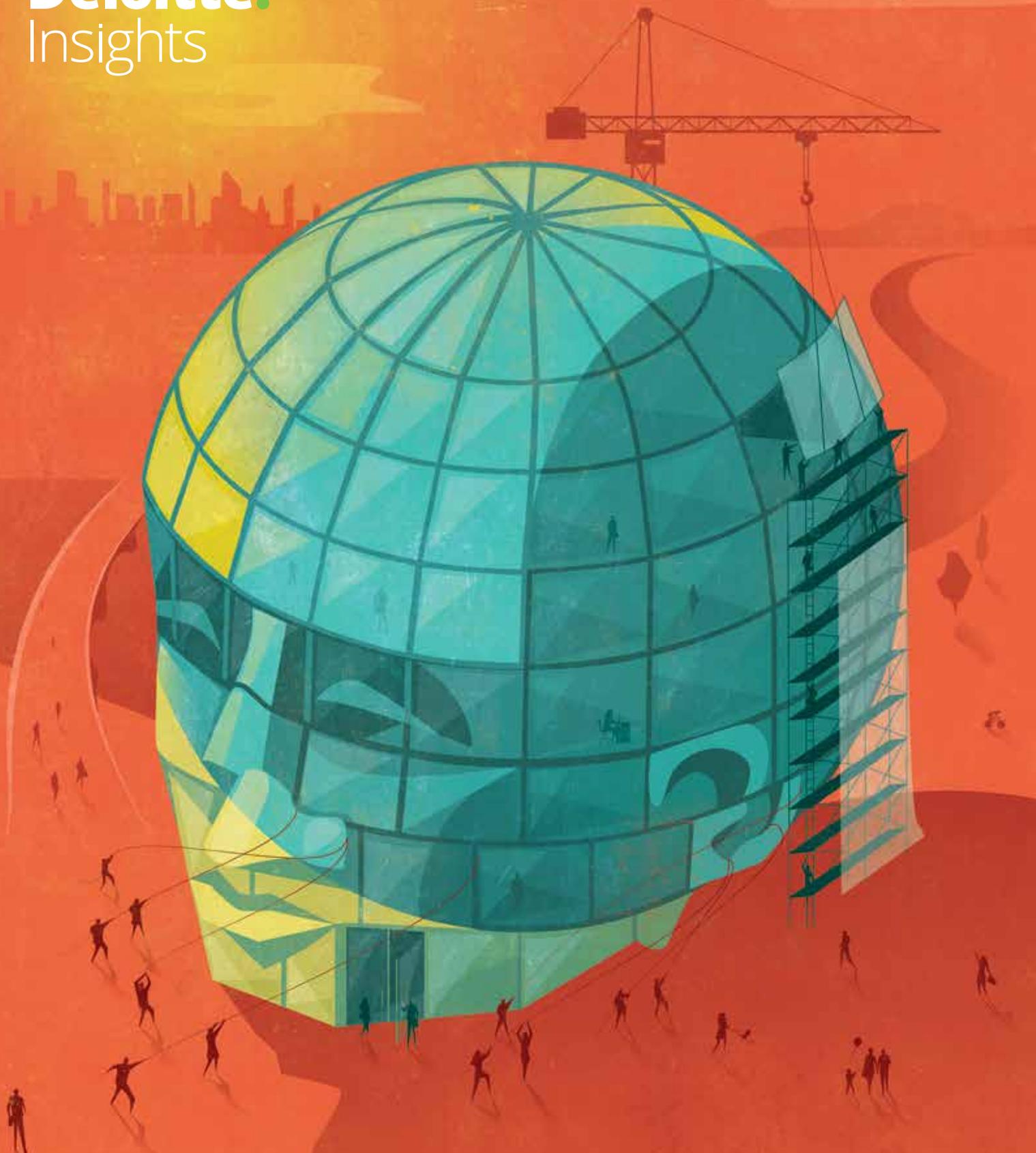


**Deloitte.**  
Insights



# The rise of the social enterprise

2018 Deloitte Global Human Capital Trends



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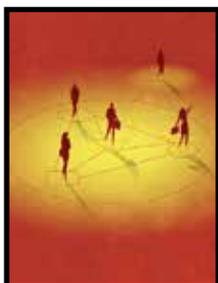
# This year's 10 trends

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 workforce ecosystem

## Managing beyond the enterprise

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**Today's workforce has become a dynamic ecosystem. Only 42 percent of this year's survey respondents tell us that their organizations are primarily made up of salaried employees, and employers expect to dramatically increase their dependence on contract, freelance, and gig workers over the next few years. As alternative work arrangements become more common in the broader economy, HR and business leaders are rapidly trying to plan and optimize their own workforce ecosystems, pressured by the need to improve service, move faster, and find new skills.**

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**T**HE composition of the workforce is changing dramatically. Globally, there are approximately 77 million formally identified freelancers in Europe, India, and the United States.<sup>1</sup> In the United States, more than 40 percent of workers are now employed in “alternative work arrangements,” such as contingent, part-time, or gig work.<sup>2</sup> This percentage is steadily rising—increasing by 36 percent in just the past five years—and now includes workers of all ages and skill levels.<sup>3</sup> In this year's *Global Human Capital Trends* survey, 50 percent of the respondents reported a significant number of contractors in their workforces; 23 percent reported a significant number of freelancers, and 13 percent reported a significant number of gig workers.

All of this suggests that, in simplest terms, the traditional employer-employee relationship is being replaced by the emergence of a diverse workforce *ecosystem*—a varied portfolio of workers, talent networks, gig workers, and service providers that offers employers flexibility, capabilities, and

the potential for exploring different economic models in sourcing talent.

While it may be appealing to hire contractors quickly or to outsource technical or service work, taking advantage of the emerging workforce ecosystem's benefits brings a variety of new challenges, and our research shows that most companies are not fully ready. When asked to forecast the makeup of their workforce in 2020, 37 percent of this year's survey respondents expected growth in the use of contractors, 33 percent in the use of freelancers, and 28 percent in the use of gig workers. But despite this anticipated growth, only 16 percent told us they have an established set of policies and practices to manage a variety of worker types, pointing to an enormous gap in capabilities.

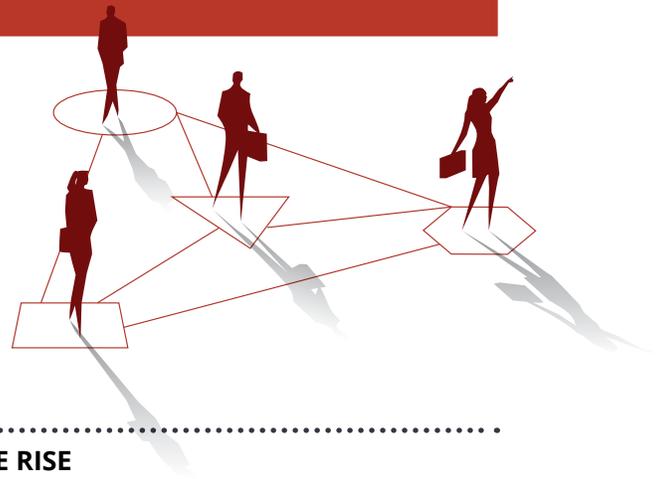
The challenge is not just the tactical one of finding enough of the right people to execute particular tasks at particular times. To drive real value through the new workforce ecosystem, organizations need to understand how to appeal to and engage with

workers of all kinds. And not all workers in this ecosystem have traditional views of what an employer-worker relationship should look like. Consider the common aspirations of millennials and Generation Z: A recent study found that 75 percent of workers in these generations plan to start their own business;<sup>4</sup> more than 70 percent want their work to support their personal interests, and only 12 percent believe that an invention they create should belong to their employer.<sup>5</sup>

### The challenges of managing the workforce ecosystem

Our interviews and survey data suggest that most non-traditional workers are managed tactically, often handled by the procurement department, with few consistent talent strategies in place. In this year's *Global Human Capital Trends* survey, only 29 percent of respondents said that their organizations track these ecosystem workers' compliance with work contracts, and only 32 percent track their quality of work.

To drive real value through the new workforce ecosystem, organizations need to understand how to appeal to and engage with workers of all kinds.

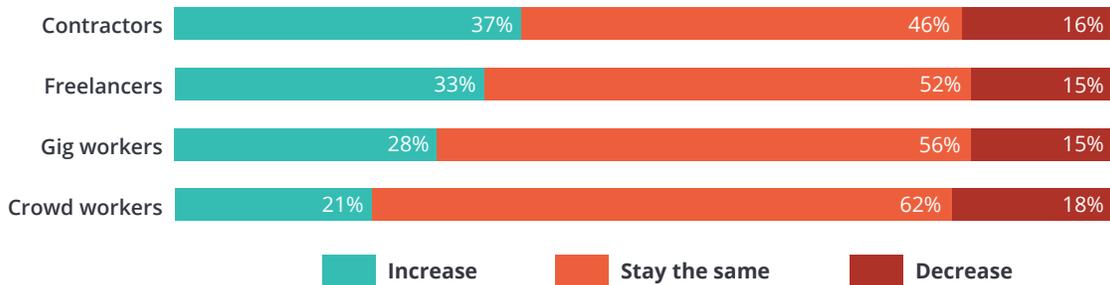


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#### ALTERNATIVE WORK ARRANGEMENTS ARE ON THE RISE

Respondents expect a substantial increase in their organizations' use of contractors, freelancers, and gig workers over the next two years.

**Figure 1. Anticipated use of each labor type in 2020 relative to today**



n = 11,070

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

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Explore the data further in the [Global Human Capital Trends app](#).

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The sheer variety of today's work arrangements makes it hard to even understand what types of workers are employed, let alone manage them strategically. As shown in figure 2, the workforce ecosystem ranges from full-time workers to freelancers, gig workers, and crowds who focus on projects and tasks but may have little understanding of or interest in an organization's overall strategy. Organizations may expect these workers to be well trained and ready to work, but in reality, they need support, guidance, and performance measures if an employer wants to optimize the entire mix.

Making things even more difficult is the fact that the HR software market has historically not built many tools to help employers manage non-traditional workers. Only in the last few years have vendors such as WorkMarket (just acquired by ADP) and Fieldglass (acquired by SAP in 2014), as well as startups such as RallyTeam, Fuel50, and others, started to offer contingent, gig, and project management tools to help companies manage and communicate with the broader workforce ecosystem.<sup>6</sup>

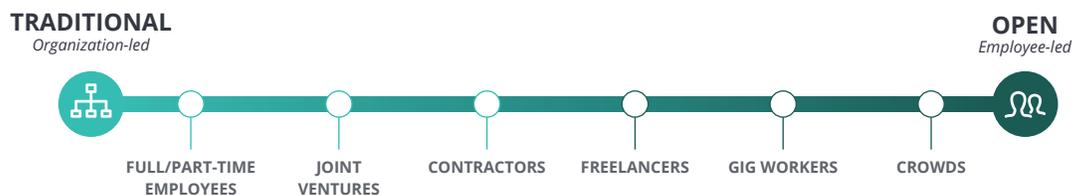
38 percent worry about the instability of a non-traditional workforce, and 39 percent worry about violations or changing government regulations in managing or categorizing these workers.

## Engaging the workforce ecosystem

What can organizations do to engage these increasingly important ecosystem workers, even as they turn away from the very idea of being “employees”? Our research and experience point to several important components of success.

First, organizations should extend their talent management approaches to workers across the entire ecosystem. HR teams should work with legal and IT to give gig and contract workers clear performance goals, secure communication systems, and the right amount of training and support to make them productive and aligned with the company's strategy. Cummins, for example, a global leader in

**Figure 2. A wide range of worker types**



Source: Deloitte analysis.

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In most cases, once they see the problem as strategic, organizations build their own tools and apps to manage the most-used types of contingent workers.

That the problem is strategic is becoming beyond debate. Aside from the opportunity cost of failing to capitalize on alternative work arrangements, new workforce models can create legal, security, privacy, and other risks. For instance, more than one-third of our respondents (42 percent) worry about the loss of confidential information due to the use of contractors, and 36 percent are concerned about the reputational risk that could arise from a negative perception of non-traditional employees. Some

power, energy systems, and engines, considers its contractors “a part of the family,” and tries to give them the same focus as full-time employees.<sup>7</sup>

Second, HR should get more involved in sourcing and selection decisions for alternative workers. Today, more than a third of our survey respondents say that HR is not involved in sourcing (39 percent) or hiring (35 percent) decisions for contract employees. This suggests that these workers are not subject to the cultural, skills, and other forms of assessments used for full-time employees. Since alternative workers can make up 30 to 40 percent of the workforce, organizations should carefully consider

under what circumstances they should be screened like regular employees, if at all.

Third, organizations should provide ecosystem workers with onboarding and development opportunities. Perhaps because organizations fear these workers will become categorized as “full-time employees,” nearly half of the HR respondents to our survey (46 percent) say they are not involved in onboarding alternative workers, and more than half (55 percent) do not support training for this population. Again, this shows a lack of understanding of the workforce ecosystem’s importance. Most employers are currently treating alternative workers as unskilled labor, not as professionals.

Fourth, companies should consider workforce brand and incentive programs that cover the range of ecosystem workers. What can alternative workers do to make more money? What skills and capabilities should they develop? How will they be measured? HR should formalize these practices for the ecosystem rather than waiting for procurement to do it.

## Success stories show the way

The challenges raised by the workforce ecosystem are all manageable, and companies can benefit from taking an integrated view of the problem. Consider a large pharmaceutical company whose in-house scientists had been struggling with a technical challenge for months. When the company engaged external talent for the problem, it found the solution in just six days.<sup>8</sup>

Businesses such as Fiverr, E-Lance, Doordash, and others have learned to manage contingent and gig workers. Many are growing at rapid rates while exploring approaches to improve alternative workers’ lives. A recent coalition led by Fiverr, Care.com, DoorDash, Etsy, Postmates, and others, working with Stride Health, has launched an initiative to help freelancers access health care programs and insurance in the United States.<sup>9</sup> As freelancers, gig, and crowd workers become a growing proportion of the workforce, improving programs like these and integrating alternative and full-time workforces will grow in importance.

### THE BOTTOM LINE

The growth of new workforce models is redefining the employer-worker relationship, and many organizations have the opportunity to draw upon today’s variegated labor market. HR and business leaders should proactively form new leadership alliances—especially between HR and procurement—to develop integrated workforce strategies and programs that can help an organization take advantage of the breadth of workforce options available today.

**Table 1. What role does the C-suite play in capitalizing on the workforce ecosystem?  
How can individuals adjust?**

<b>CHRO</b>	Develop workforce management strategies that leverage open talent workforces to meet the organization's changing needs. Work with managers supervising contingent workers to shift their focus toward these workers' engagement and productivity, instead of concentrating strictly on task performance. Create development opportunities and performance management approaches to help give off-balance-sheet workers access to learning experiences and coaching while engaged with your organization.
<b>CFO</b>	Understand the financial implications of the workforce ecosystem and work with business leaders to understand the financial benefits that can be achieved by managing this extended workforce. The significant potential implications for the balance sheet make it important to take a proactive view of how an organization's changing workforce composition can affect a large cost item on the P&L.
<b>CIO</b>	Work closely with HR to create an IT infrastructure to help effectively manage the workforce ecosystem. Help your organization move past the use of different systems to manage full-time employees vs. alternative workers. Aim to develop a single workforce management solution that can provide full and consistent visibility to the workforce as a whole.
<b>Chief risk officer</b>	Consider what new policies may be needed for managing employment responsibilities within the workforce ecosystem, including policies around issues such as protecting confidential information and managing reputational risk. Work closely with HR to determine where new policies may be needed, and constantly monitor (and, where appropriate, seek to influence) the regulatory environment around how employers engage with new worker types.
<b>Individuals</b>	Use the open talent economy to your advantage. Employers who have embraced the workforce ecosystem and are using different types of work arrangements can help you gain the experiences you need to increase your attractiveness in the employment market.

Source: Deloitte analysis.

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## 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 | [jbersin@deloitte.com](mailto:jbersin@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.

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### **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

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