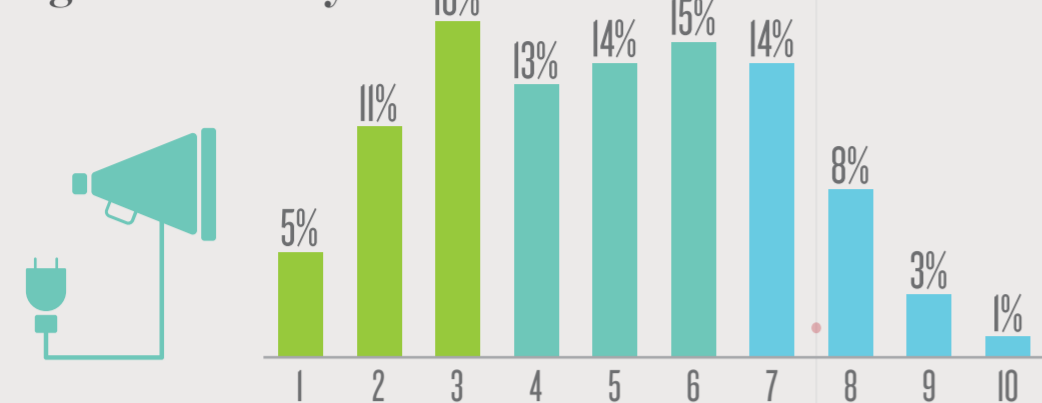


Moving digital transformation forward

DIGITAL MATURITY* NEEDS CULTIVATION AND VISION

Companies are unprepared, largely due to internal obstacles.

An organization's digital maturity:



87% believe digital technologies will disrupt their industry

44% feel adequately prepared for disruptions projected to occur in their industry due to digital trends

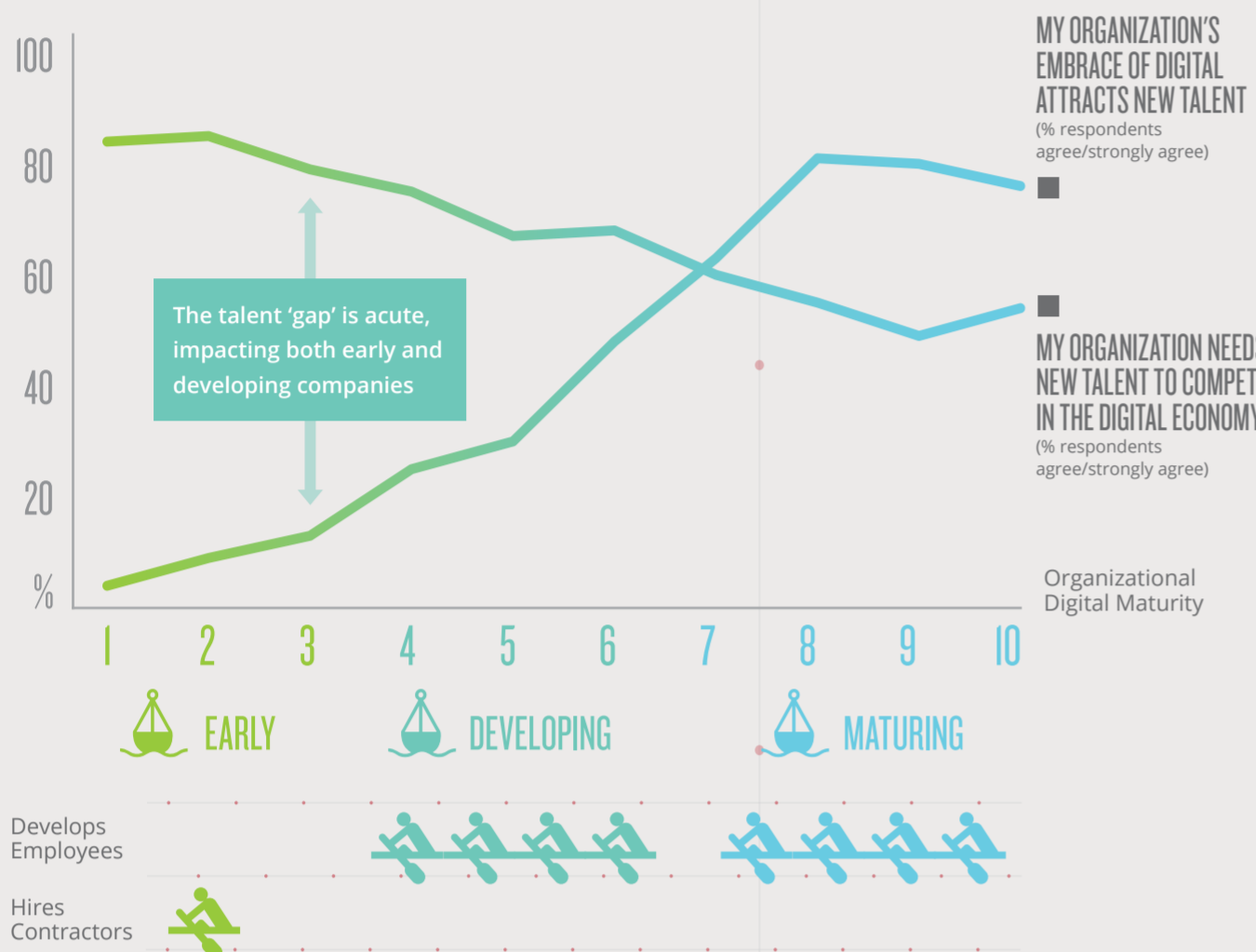
EARLY DEVELOPING MATURING

Talent

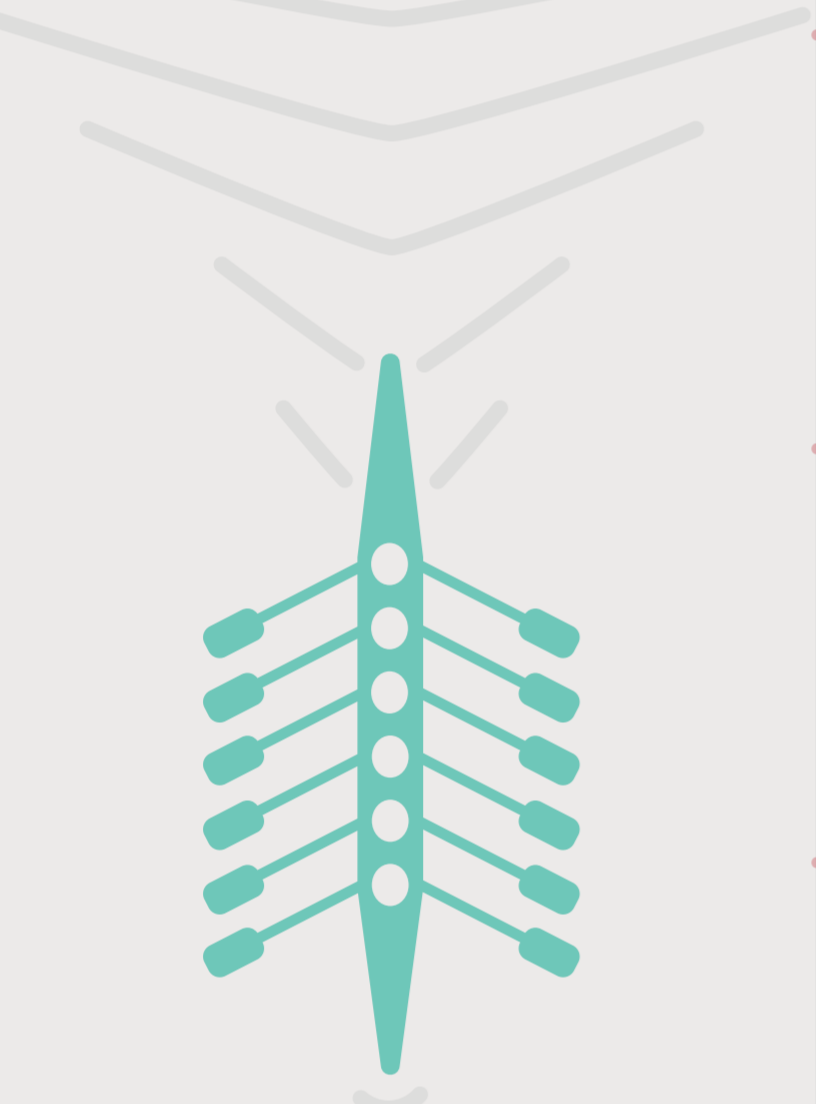
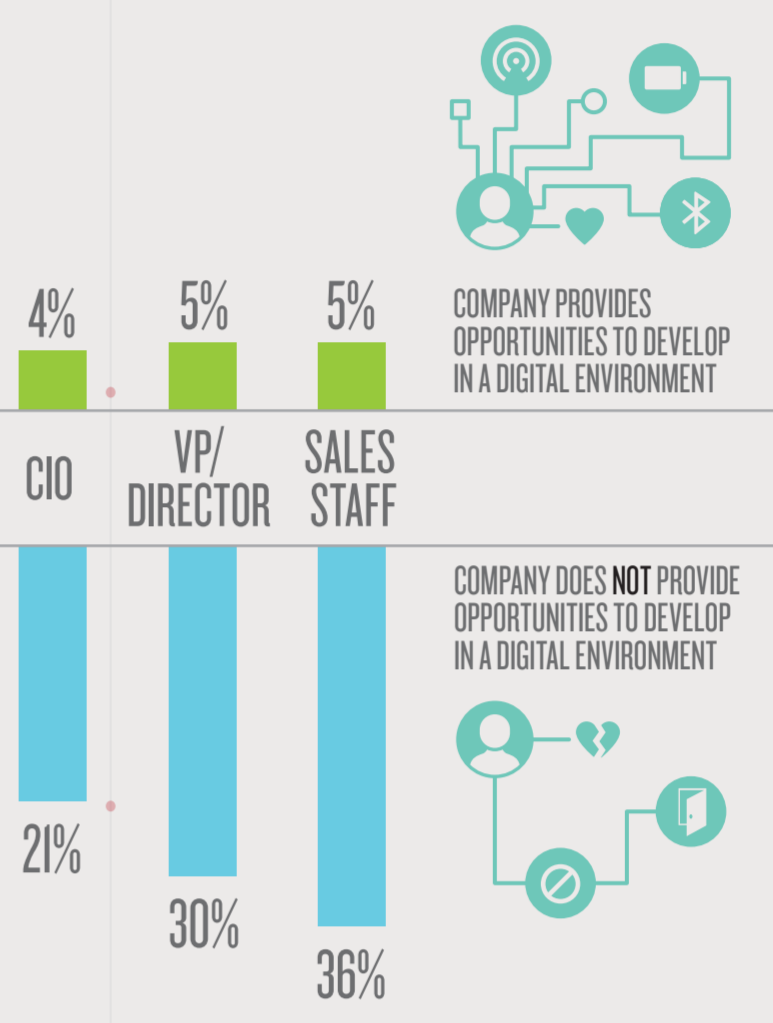
WAIT...WHERE'S EVERYONE GOING?

Maturing companies develop from within. People who aren't getting digital opportunities are leaving.

How is my organization strengthening digital innovation capabilities?



Plan to leave their organization in less than one year, given digital trends:

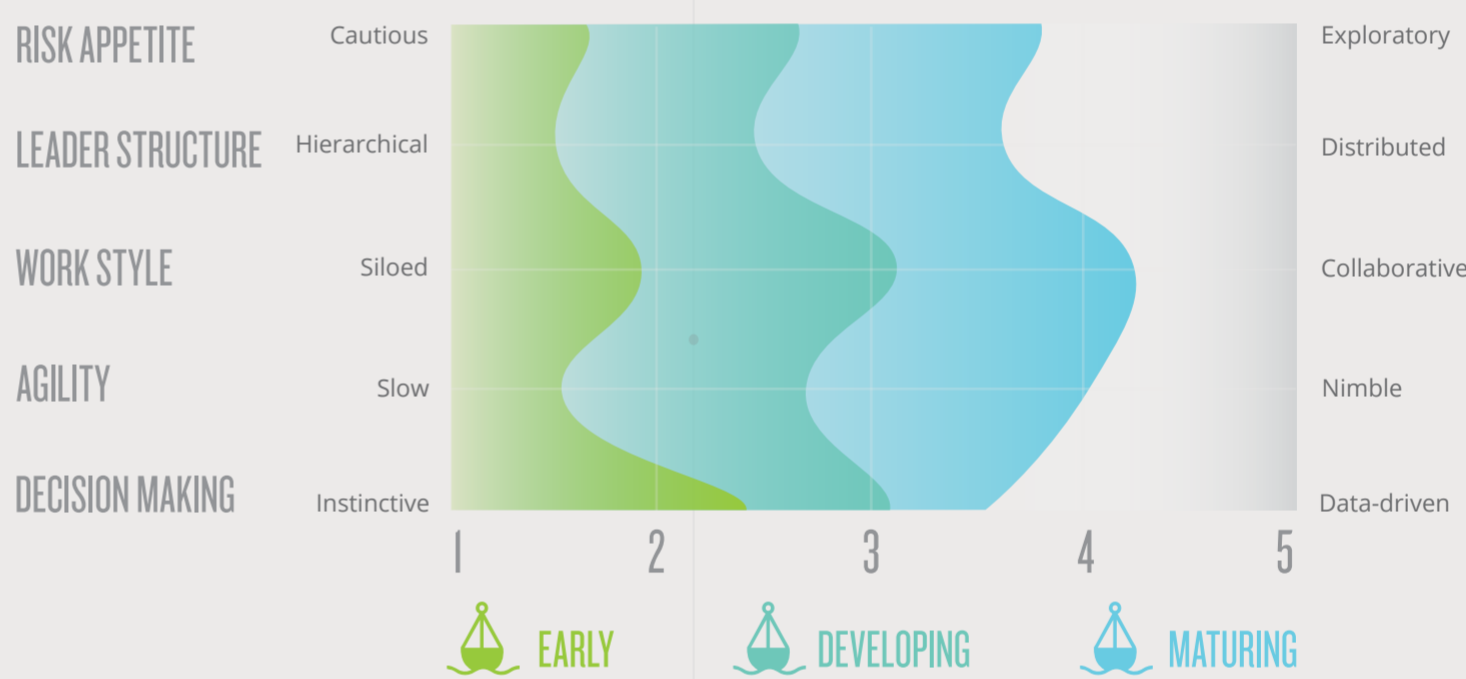


Culture

CORPORATE DIGITAL CULTURE MATTERS...A LOT.

Motivating cultural traits are shared across maturing companies.

How organization cultures are measuring up:

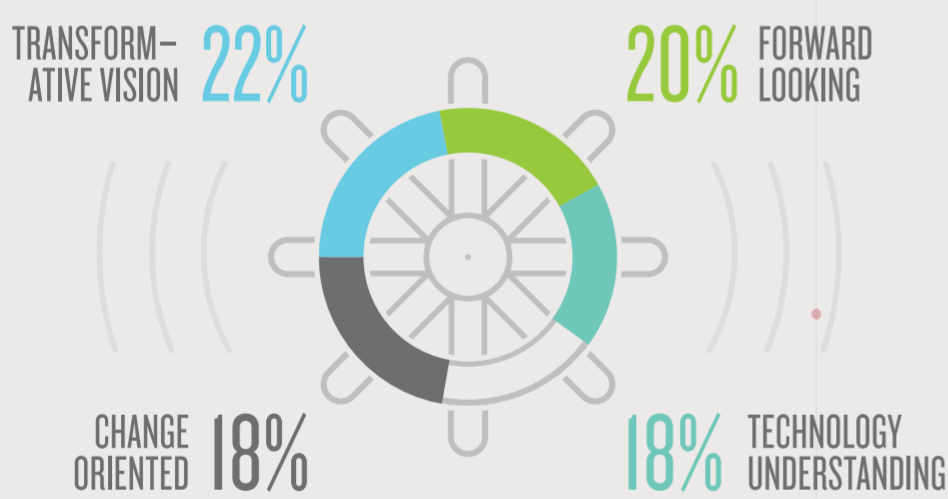


Leadership

STEADY AT THE HELM

Leaders with vision are critical to driving digital changes.

Most important leader skill:



Effective change management is imperative to making the transformation from "doing" digital things to "becoming" digital.

"Time frames greater than 10 years may be needed in a digital environment."

John Hagel, co-chairman of the Center for the Edge at Deloitte

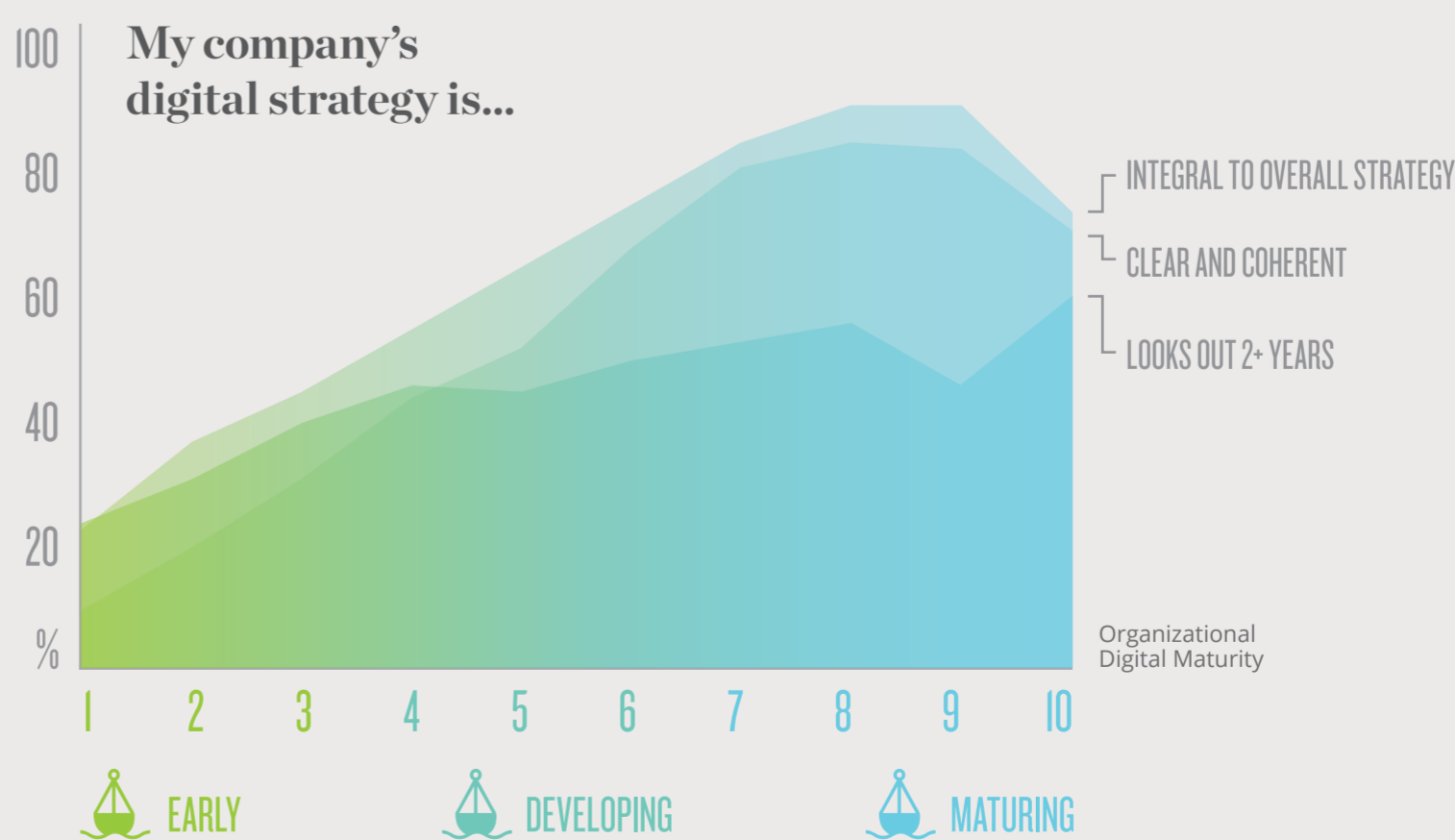
Silicon Valley companies follow a 'Zoom Out and Zoom In' approach:



Strategy

WHERE DO YOU GO FROM HERE?

Take a long-term view. Longer than that. No, even longer.



*We asked respondents to "imagine an ideal organization transformed by digital technologies and capabilities that improve processes, engage talent across the organization and drive new value-generating business models." We then asked respondents to rate their company against that ideal on a scale of 1 to 10. Three maturity groups were observed, 'early' (1-3), 'developing' (4-6), and 'maturing' (7-10).