

The Accenture logo, featuring the word "accenture" in a lowercase, sans-serif font with a greater-than sign (>) positioned above the letter 'u'.

accenture

The "Into the New" logo, consisting of a lightbulb icon with a right-pointing arrow inside it, followed by the text "INTO THE NEW" in a bold, uppercase, sans-serif font.

INTO
THE NEW

INNOVATE TO CREATE YOUR FUTURE TODAY

**Applying the New with
Oracle Technologies Now**

Accenture Technology Vision for Oracle 2019

FOREWORD

Bold business leaders use technology and innovation as strategic weapons to dominate their markets and create their future. Always forward-focused on cultivating new winning opportunities, they make a conscious choice to exist in a state of permanent transformation.

We are pleased to share the Accenture Technology Vision for Oracle 2019, our annual forecast of technology innovation. This year's vision, "Innovate to Create Your Future Today," shares our latest research insights into the key trends that will influence business leaders during the next three to five years. We'll explore how these trends are converging to lead us into a "post-digital" world, and how we are enabling our clients to thrive in this new world with Oracle Cloud.

The vision lays out a path for leaders, and it's paved with digital transformation. The focus is on harnessing data for developing the best analytics insights to make the smartest decisions for driving growth at scale and speed.

The post-digital era offers tremendous opportunities for companies that proceed responsibly. Enabling your journey means strengthening digital trust in securing, storing and using data. Oracle Cloud provides a supercharged platform, delivering solutions across the three main cloud tenants: software as a service,

platform as a service and infrastructure as a service. It's purpose-built to enable your journey forward, allowing you to rapidly innovate while opening new conduits to drive growth and value.

Oracle Cloud embeds analytics to enable intelligent, data-driven insights into individual product, service and technology preferences. These insights will be used to create more personalized, mutually rewarding business connections with customers, employees and ecosystem partners. The power of the cloud will be amplified by distributed ledger, artificial intelligence, extended reality and quantum computing technologies.

Accenture is partnering with Oracle to deliver cloud solutions today that bring these innovations to life, transforming our clients' visions into reality. In this Technology Vision, we can learn from each other, how leaders across industries are creating future success.

Opportunity awaits. We look forward to sharing and helping you create what's next.



A stylized, handwritten signature of Pat Sullivan in black ink.

Pat Sullivan
Managing Director,
Oracle Business Group



A stylized, handwritten signature of Samia Tarraf in black ink.

Samia Tarraf
Managing Director,
Oracle Cloud Business

EXECUTIVE SUMMARY

Technology innovation has been on a fast track, propelling companies toward an exciting post-digital world of business opportunity. Companies are taking their first steps in this new world that tailors itself to fit every moment—with data. It's a world where products, services and even people's surroundings are customized as businesses cater to individuals in every aspect of their lives.

94%

of business and IT execs report, the pace of innovation accelerated over the past three years due to emerging technologies.

It's time to make your data reign. Creating future success begins with trust.

More than nine in 10, or 94 percent, of 6,672 business and IT executives included in the Accenture Technology Vision 2019 survey report that the pace of innovation in their organizations accelerated over the past three years due to emerging technologies. Accelerating innovation and the changing competitive landscape, with lean “born-in-the-cloud” companies is driving leaders to rapidly hone their digital capabilities for continued future success.

The wave of digital disruption has evolved into a data tsunami today. The pace at which data is generated is mind-blowing. There are 2.5 quintillion bytes of data created daily—and it's expected to keep growing.¹

Data is the ultimate currency, but many companies don't realize the value. Companies base their management and operational decisions today on a wealth of data they don't necessarily trust, and you need trusted data to make informed business decisions.

“ The opportunities to drive growth and improve efficiencies through the use of data and new technologies are unlimited. To be successful—at scale—companies must prioritize the business outcomes they seek by matching their data with investments in quality and trust. Accountable leaders must commit to clear principles that guide the responsible use of data and technology.”

Julie Sweet, Chief Executive Officer,
Accenture North America

EVERY DIGITAL TRANSFORMATION IS A DATA TRANSFORMATION

The good news: Some companies may not even realize it, but they are well on their way to transforming their business, embracing new opportunities for driving growth and greater value.

If they are in business today and expect to be tomorrow, chances are they are already looking at and applying enabling technologies as part of their digital transformations.

The bad news: Companies that wait to harness the value of their data will be disrupted.

The bold business leaders are setting new business goals while accepting and managing massive responsibility around societal expectations for the use of data, including privacy, safety, ethics and governance. Together, Accenture and Oracle are helping clients create their way forward—Oracle is providing the enabling technology, and we're partnering with our clients to guide the path.

Oracle has evolved into one of the world's largest software companies and a leading enterprise cloud provider, with cloud offerings recognized in the industry for vision and functionality.² The company's roots, which began in data, run deep today—**430,000 customers** in **175 countries** use Oracle technologies to seize business opportunities and solve real, tangible challenges.³ According to Oracle, it has garnered **83 million-plus weekly users** with **72 billion transactions** processed per day and more than **1,800 petabytes** of data managed across its cloud.

Accenture offers in-depth experience with developing, testing and implementing Oracle Cloud-based solutions for clients in the marketplace across a range of industries. Accenture also extends Oracle Cloud with innovative solution offerings for clients, such as Accenture Digital Assistant for Oracle Cloud.

LEADERS HAVE NOT JUST EMERGED— THEY ARE WELL ON THEIR WAY

Hearst, a leading global, diversified media company, has grown and reinvented itself numerous times—and today, is an example of a truly digital company. Hearst selected Accenture to lead one of the largest multi-pillar SaaS implementations on Oracle Cloud in production today, spanning 200-plus business units. As a result, Hearst now has a modern cloud platform that can scale to support its acquisition-focused growth plans well into the future. The Oracle Cloud solution implementation provided Hearst with one common chart of accounts, electronic approvals and enhanced analytical and reporting capabilities. Along with complete visibility, Hearst's operations were enabled with self-service access to its finance and human capital data via dashboards and visualization tools.

The recruitment and staffing agency **TrueBlue** has a history of organic and acquisition-based growth, and needed to implement a modern, scalable platform for enabling efficient future growth. Working with DAZ Systems, part of Accenture, TrueBlue realized the value of an integrated Oracle Cloud solution for its 6,000 employees that consolidated and standardized TrueBlue's operations and delivered improved visibility and global analytics across enterprise resource planning and human capital management.

The Wonderful Company is a privately held \$4 billion-plus company with a range of healthy consumer products. To efficiently support its future business growth with a modern, scalable platform, the Wonderful Company is moving to Oracle Cloud with the help of DAZ Systems, part of Accenture. With its move to the cloud, the company is working to deliver time and cost savings through business process standardization and automation while also seeking to improve access to critical data and enhance the user experience.

WHAT NOW, WHAT NEXT: CREATING YOUR WAY FORWARD

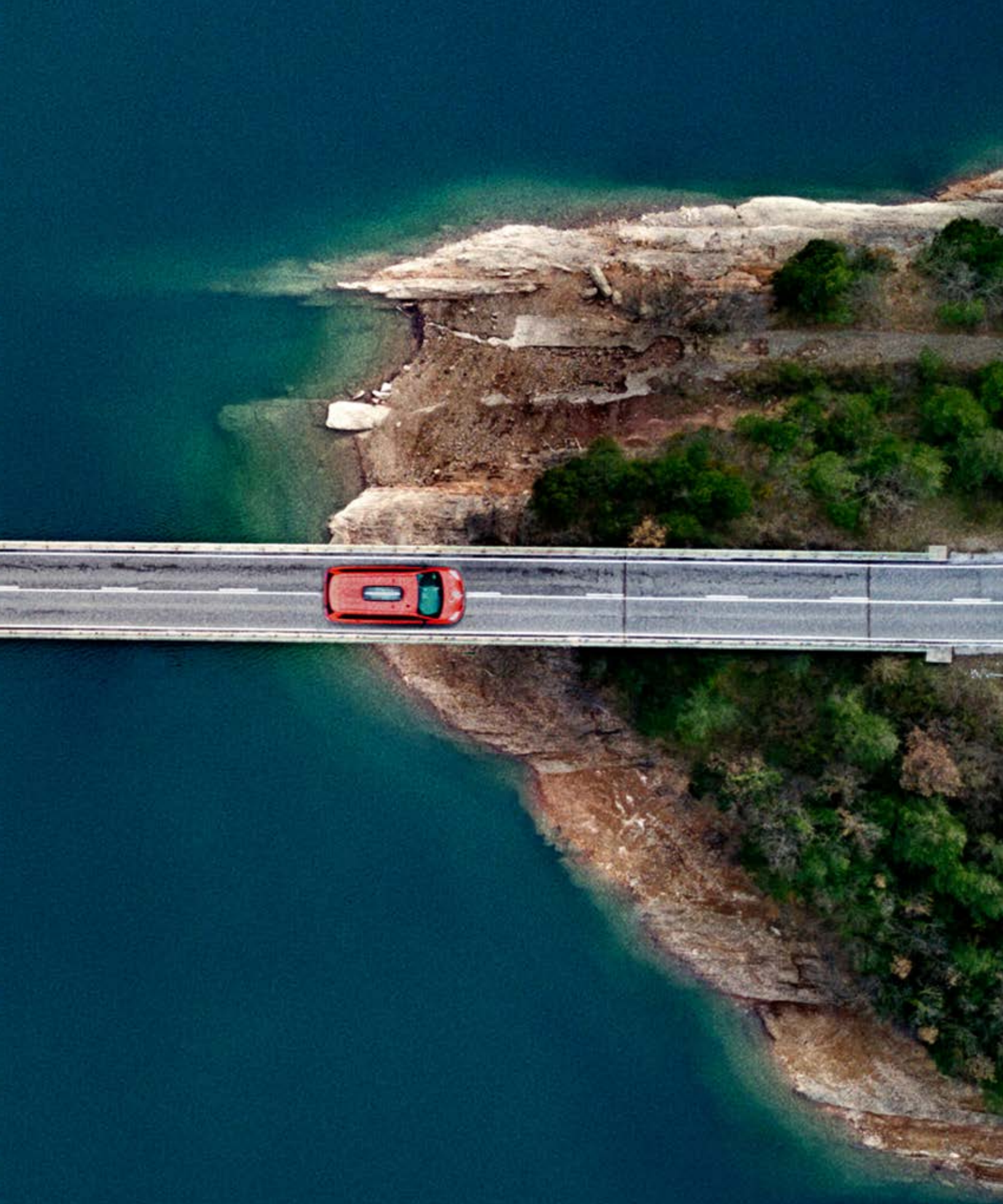
Don't wait—create! Moving forward as a post-digital business, you'll have the opportunity to focus more on creating impactful moments to engage with your customers, employees and business partners.

Every moment will represent a potential new market of one, creating an infinite stream of business opportunities to be met through engagement. Critical to success, you will need to carefully choose the specific business opportunities to target—and just as important, the ones not to target.

Accenture's clients achieve high performance with Oracle Cloud by starting with an outcome-focused approach and creating a roadmap to get there.

To create opportunities for continued growth into the future, you'll need to set and implement new goals to lead your business:

- Start by identifying your end destination so that key decisions are in service toward your goals.
- View your data as core to your business, transforming it into actionable insights.
- Consider the impacts of ecosystem partnerships in meeting clients' needs and enabling digital trust.
- Master social, mobile, analytics and cloud as a foundation for rotating to "what's next."



EMBRACING FIVE KEY SHAPE-SHIFTING TRENDS

As digital saturation raises expectations, abilities and risk across industries, businesses are seeking new ways to differentiate for continuous growth in post-digital markets. This year's Accenture Technology Vision highlights five key emerging trends that will shape businesses over the next three to five years:

Trend 1

DARQ POWER

Understand the DNA of DARQ

New technologies are catalysts for change, offering businesses extraordinary new capabilities. Distributed ledger technology, artificial intelligence, extended reality and quantum computing will be the next set of new technologies to spark a step change, letting businesses reimagine entire industries.

Trend 2

GET TO KNOW ME

Unlock unique consumer insights and opportunities

Technology-driven interactions are creating an expanding technology identity for every consumer. This living foundation of knowledge will be key to not only understanding the next generation of consumers but also to delivering rich, individualized, experience-based relationships in the post-digital age.

Trend 3

HUMAN+ WORKER

Change the workplace or hinder the workforce

Workforces are becoming human+: each individual worker is empowered by their skillsets and knowledge plus a new, constantly growing set of capabilities made possible through technology. Now, companies must adapt the technology strategies that successfully created this next-generation workforce to support a new way of working in the post-digital age.

Trend 4

SECURE US TO SECURE ME

Use technology as the first line of defense in an interconnected world

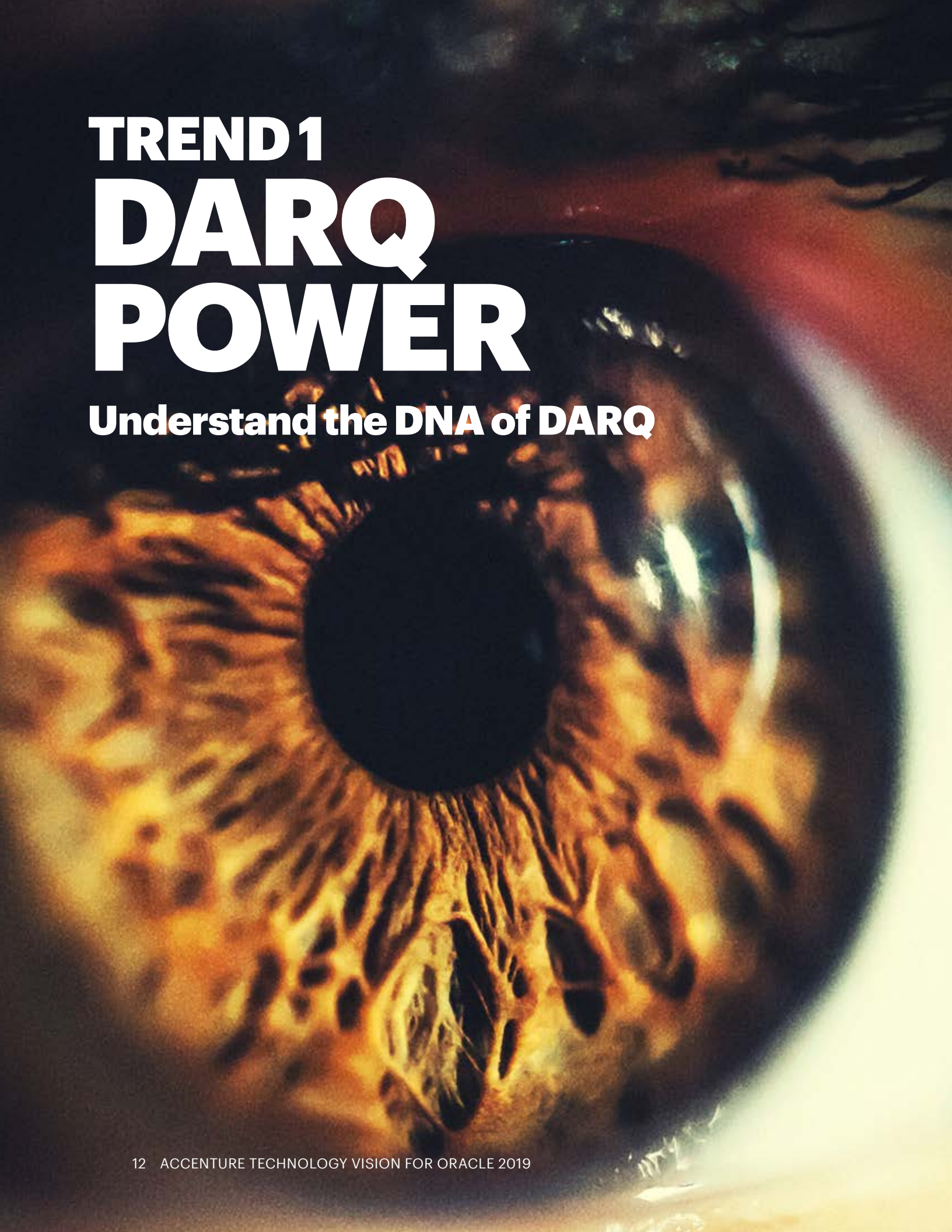
While ecosystem-driven business depends on interconnectedness, those connections increase companies' exposures to risks. Leading businesses are recognizing that just as they already collaborate with entire ecosystems to deliver best-in-class products, services and experiences, it's time security joins that effort as well.

Trend 5

MYMARKETS

Meet consumers' needs at the speed of now

Technology is creating a world of intensely customized and on-demand experiences, and companies must reinvent their organizations to find and capture those opportunities as they come. That means viewing each opportunity as if it's an individual market—a momentary market.



TREND 1
DARQ
POWER

Understand the DNA of DARQ

As the world moves into a post-digital era, companies are setting their sights beyond digital transformation. They are moving toward shaping how governments, business partners, employees and individuals interact with the world through technology.

To enable continued success, future-minded leaders know that they will need every digital tool in their current arsenal, and they'll also need new ones. Eighty-nine percent of businesses included in Accenture's Technology Vision 2019 survey are already experimenting with one or more DARQ technologies, expecting them to be key differentiators.

Distributed ledger technology (DLT) will expand networks by eliminating the need for trusted third parties.

Artificial intelligence (AI) is already playing a critical role in optimizing processes and influencing strategic decision-making.

Extended reality (XR), an immersive technology, is creating entirely new ways for people to experience and engage with the world around them. **Quantum computing** will usher in novel ways to approach and solve the hardest computational problems.

DARQ technologies, layered on top of a cloud platform, will now help catapult post-digital businesses ahead to discover unimagined pathways for the future.

89%
of businesses are
already experimenting
with DARQ.

The good news for our customers is that Oracle is making significant investments in DARQ technologies, automatically embedding capabilities within the Oracle Cloud enterprise suite.

The next set of technologies every company will need to master:



Distributed Ledger
Technology (DLT)



Artificial
Intelligence (AI)



Extended
Reality (XR)

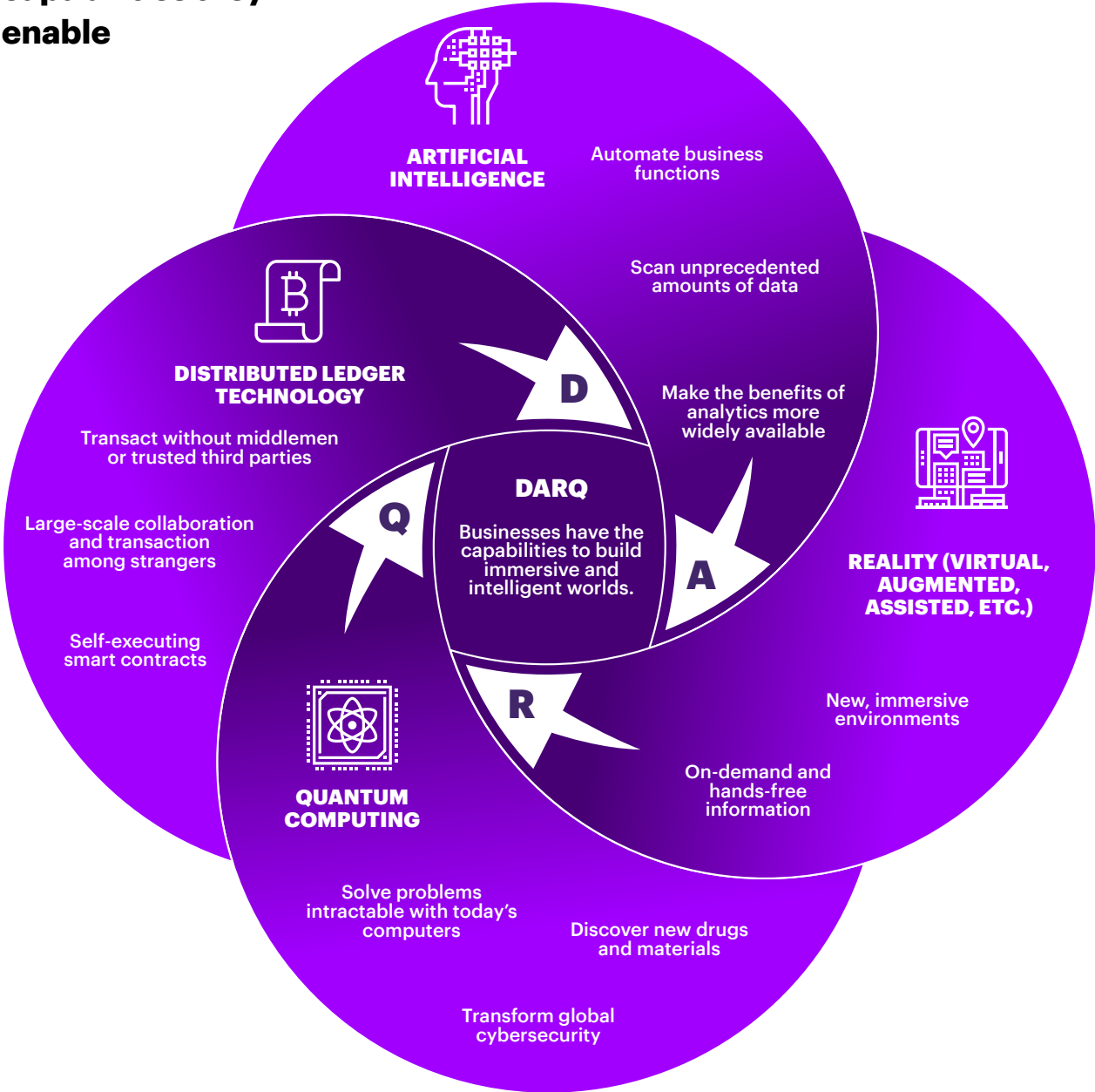


Quantum
Computing

Across the DARQ technologies, investments and adoption are rising steadily. Virtual reality (VR) and augmented reality (AR) saw a **12 percent** increase in investment between 2016 and 2017, reaching **\$3 billion** that year; in the first three months of 2018, companies invested **\$750 million** in AR/VR startups.⁴

Distributed ledger investments are exploding, with blockchain and cryptocurrency-focused startups alone collecting almost **\$3.9 billion** in investments in the first three quarters of 2018—**nearly three times** the total for all of 2017.⁵

**DARQ technologies
and some of the
capabilities they
enable**



EXPLORING THE DARQ WITH ORACLE

Oracle is setting the market standard for driving innovation, evolving its cloud-based platform with a DARQ-powered business model.

Oracle is layering its cloud platform with the latest technology investments—made both organically and through over 200 acquisitions. Because new DARQ capabilities are continually being integrated into Oracle’s suite, clients don’t need to evaluate and integrate solutions separately. As part of its platform-as-a-service (PaaS) portfolio, Oracle has invested in distributed ledger technology, developing the Oracle Blockchain Cloud Service. A preassembled PaaS, it includes all the required dependencies for supporting blockchain network components, facilitating solution adoption and integration with AI capabilities for clients.

Across its software-as-a-service (SaaS) suite, Oracle has been embedding AI and machine learning (ML) capabilities through quarterly updates. In essence, every Oracle SaaS user is now an AI and ML user. For example, Oracle has used AI and ML to enable security groups to predict when a hack might take place or predictive analytics insights for providing recommended sales actions, intelligent supplier categorization, smart candidate lists and personalized product recommendations. Accenture and Oracle have been collaborating to create C-suite dashboards via a digital boardroom. These intelligent and predictive dashboards enable executives to easily view the data that is important to their businesses in real time.

DIGITAL BOARDROOM

Drive better decisions with business visibility and intelligent insights

Accenture and Oracle created the digital boardroom, consisting of a series of C-suite dashboards, to provide the intelligent, data-driven insights corporate leaders need to drive effective management and operational decision-making. The three dashboards include:

- **KPI dashboard** is used at the onset of a project to compare key operational metrics against those of their peers.
- **CFO Dashboard** offers a quick way to monitor an organization's financial health and, if there are problems, drill down to determine the root cause.
- **CHRO dashboard** provides the ability to track performance against various and competing HR objectives, such as diversity targets, in a single location.

Built on the Oracle Analytics Cloud, the digital boardroom uses a KPI simulator app with predictive algorithms to calculate future values for the various KPIs. Also included, an attrition predictor app uses machine learning to help identify employees at high risk for leaving a company.

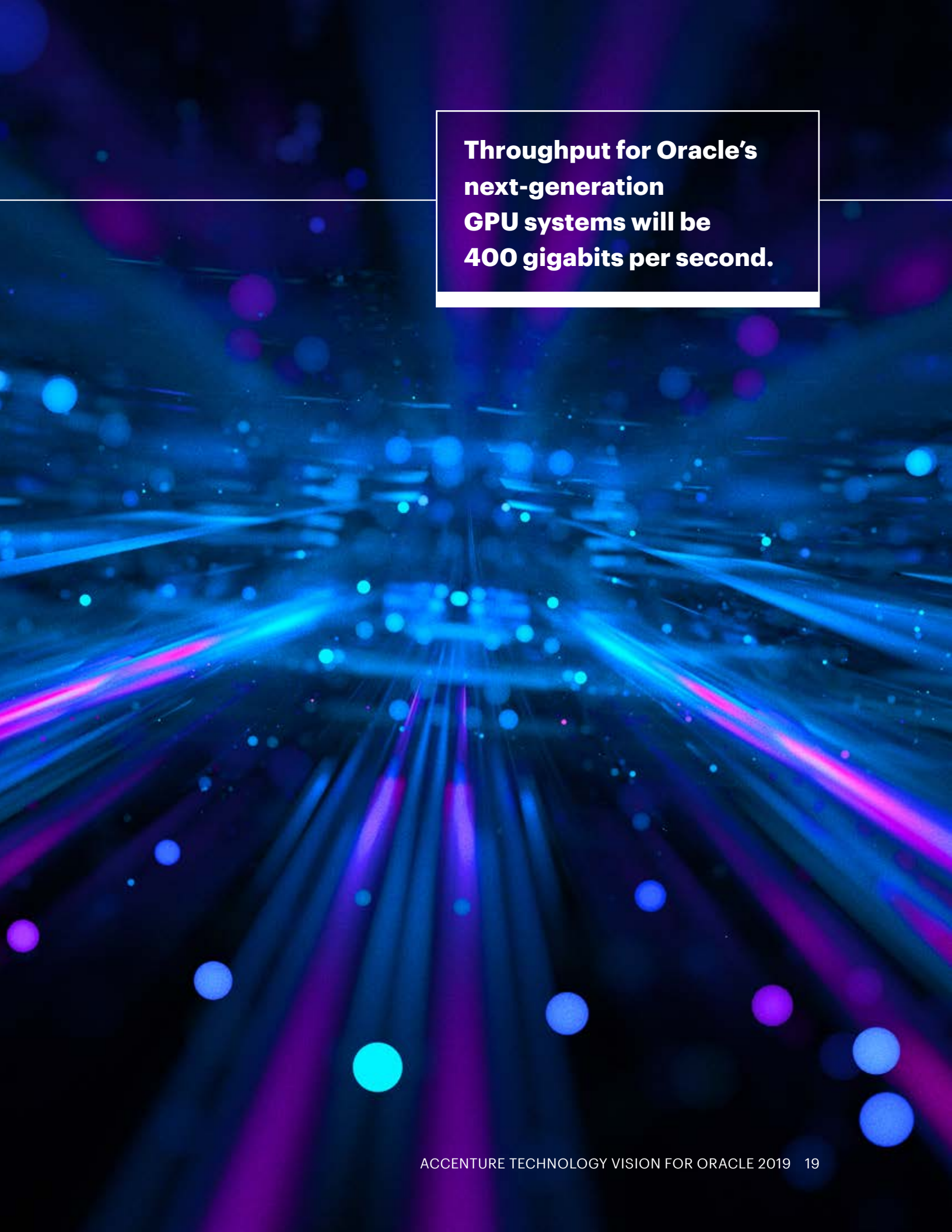
HIGH-PERFORMANCE COMPUTING

Oracle is investing in and enabling high-performance computing (HPC) and graphics processing units (GPUs) for clients in the cloud.

What you used to only be able to do in a lab or on premise with super computers, you can now do in the cloud with Oracle Cloud Infrastructure (OCI) Generation 2. Oracle provides a set of solutions to help enterprises run HPC for various performance-sensitive workloads, such as AI or engineering simulations.

Some examples of HPC workloads across industries include DNA sequencing in healthcare, reservoir simulation for oil exploration and car crash simulations in automotive. Considering a scenario with autonomous cars, they must be equipped to make split-second decisions on the road when confronted with dangerous conditions to help avoid accidents. They require a high-capacity, high-performance cloud with a computing backbone that can process data FAST.

Leveraging expertise through its acquisitions, such as Sun Microsystems, and billion-dollar investments in engineering capabilities, Oracle is also enabling faster processing through networks. These new instances are part of Oracle's new "Clustered Network," which gives customers ad-hoc, on-demand access to a low latency and high-bandwidth remote direct memory access (RDMA) network.



**Throughput for Oracle's
next-generation
GPU systems will be
400 gigabits per second.**



GAINING COMBINATORIAL EFFECTS

As businesses explore new capabilities, some of the DARQ technologies will be more immediately relevant than others.

Forty-one percent of business and IT leaders included in Accenture's survey report that AI will have the greatest impact on their organizations over the next three years, while 19 percent say their greatest impact during the same time frame will come from distributed ledgers. But to use the technologies to their greatest potential—now and when all four have matured—businesses need to think about the value in combining them.

To take advantage of the new transformational capabilities that DARQ technologies will offer, businesses must explore the possibilities now all along the spectrum. For some, this means launching pilots. For others, it means looking into startups and building relationships or making acquisitions. The companies that recognize the opportunity—and begin to explore possibilities and investments with strategic focus—will be leaders in a brand-new competitive landscape.

TREND 2 GET TO KNOW ME

Unlock unique consumer insights and opportunities

The sets of technologies people use today are now so integrated into their lives that they have become a part of consumers' identities, which leaders are using to create next-generation offerings.

These identities are part of an emerging enterprise data feedback loop that first showed its potential with personalization efforts of the digital era. Now, that feedback loop is about to kick into overdrive as today's consumer world has changed.

Personalized service has to be integral to every customer interaction today. Consumers are quicker than ever to opt out of a purchase at the first notion of a poor interaction, while millennials expect personalized service from the outset. Eighty-three percent of business leaders in Accenture's survey agree that understanding consumers' behaviors around technology will be critical for their organizations to increase loyalty.



83%

**of business leaders
agree, understanding
consumers' behaviors
around tech will be
critical for loyalty.**

As the world moves into the post-digital era, companies are beginning to build new products and services that shift the one-off, transactional exchanges between businesses and consumers to an ongoing, customized relationship. They are moving beyond personalized products and services to individualized experiences, creating a one-to-one relationship with each customer where technology plays the starring and ever-present role.

The focus is on becoming each individual customer's ongoing, trusted partner. By understanding the technology people use and how they use it, companies can integrate more seamlessly into their lives to unlock unique insights and business opportunities.

To this end, savvy businesses are taking their first steps with technology identities to personalize their existing product and service offerings. Leaders can push even further to craft new individualized, experiential business models entirely around the technology identities of their customers.

North American life insurance company John Hancock has found technology identities to be so valuable that it has done away with the traditional life insurance model. Now, the company offers interactive life insurance policies that incorporate clients' fitness and health data through wearable devices. John Hancock's "Vitality" program policyholders qualify for discounts when they hit certain exercise targets and can get personalized premiums and rewards for their activity.^{6,7} The results speak for themselves: the average customer with a traditional insurance plan engages with their life insurance company one to two times per year. The new Vitality policyholders engage with John Hancock more than 500 times per year.⁸

TREADING THE LINE OF TRUST

With every future offering poised to be individualized, companies must avoid overstepping personal boundaries with customers.

There is a very fine line to tread between building and breaking consumer trust. It's the difference between creating a tailored, seamless experience that neatly integrates into a specific customer's life or losing a potentially lifelong relationship by creating an experience that is out of sync with their needs and expectations.

A **North American telecom company** is keenly focused on using data to get to know its customers. The company is powering lead management with Oracle Sales Cloud Customer Data Management (CDM) and using Oracle Eloqua Marketing Cloud to understand how to best engage with its customers.

The Oracle Cloud solution was implemented to help the company address a complex set of challenges with: inconsistent customer communication across marketing and sales; a series of one-off campaigns, manual execution and targeting population sub-segments; and fragmented and incomplete data for building campaign segments and providing insights to sales.

Accenture delivered the solution which involved the creation of a customer data master in Oracle CDM with over 100 million records and a process for updating all source data. Accenture also helped automate campaign orchestration based on a single view of the customer that drives a lead management process. The configuration and usage of Oracle Eloqua was then optimized to support improvements in lead nurturing, qualification and close activities, and digital behavior insights from Eloqua sales tools.

Other key benefits of the solution delivered include the completion of a pilot evaluation of Oracle Sales Cloud with **98 percent** disposition of assigned leads from Oracle Eloqua. Positive qualitative seller feedback was received on data quality of leads compared to legacy systems. Pilot sellers leveraged Eloqua Engage to send emails with high deliverability and a **32 percent** unique open rate. Email deliverability increased by **95 percent**, while operational efficiency was improved for building marketing campaign segments by alleviating the need to use data from multiple sources.

NOT WITHOUT CHALLENGES

Businesses need to understand the breadth of how consumers are using technology if they want to deliver rich, seamless experiences in the post-digital age—including the issues of access that affect consumer choice.

Seventy-three percent of the business and IT executives Accenture surveyed agree that consumers' digital demographics (vs. traditional demographics) are increasingly becoming a more powerful way to understand their organization's customers. This starts with a clear and constantly updating picture of the technologies that consumers are willing to and can incorporate into their lives.



THE DETAILS ARE IN THE DATA

Oracle Data Cloud delivers a set of solutions that enable agencies, brands, media platforms and publishers to use data more effectively and drive better business outcomes.

Oracle's revolutionary new data as a service (DaaS) evolved and is underscored through a series of key acquisitions, including AddThis, BlueKai, Crosswise, Datalogix, Grapeshot and Moat. The growing desire to seek competitive advantage from the use of data and the challenge of managing an increasingly complex and heterogeneous data landscape have created the right conditions for DaaS to emerge.

Oracle Data Cloud helps advertisers connect with the right customers—making every interaction personal and then measuring engagement effectiveness to prove success. Creating true cross-channel consumer understanding, companies are empowered with more detailed knowledge about who their customers are, what they do, where they go and what they buy.

Oracle's Adaptive Intelligent Apps leverage the Oracle Data Cloud to improve customer experience, human capital management, and finance and supply chain enterprise resource planning—pulling data to facilitate better decision making. Imagine getting to know your finance and procurement operations better: artificial intelligence,

machine learning and DaaS can be used to analyze finance and procurement data to provide valuable insights in a similar way to how B2C companies gather consumer-oriented insights.


For example, intelligent payment discounts can provide smart discount recommendations for early invoice payments to help optimize cash. In procurement, the system can analyze data for recommendations on global sources and suppliers based on previous effective purchases across the organization.

A digital assistant, like a chatbot, can also be used to help individual employees self-serve purchasing activity. Accenture's Digital Assistant for Oracle Cloud allows related tasks to be automated, such as sending the order to procurement for approval and then to finance for payment, saving time and effort—all without ever logging into the actual application by using our intuitive digital assistant. Oracle's Adaptive Intelligent Apps essentially treat employees as customers, facilitating their work and reducing time-consuming administrative activity.

EARNING TRUST, ONE CONSUMER AT A TIME

Integrating experiences into customers' lives requires an ongoing, intimate level of understanding; such insights rely on a strong foundation of trust and responsibility, which companies must maintain through every consumer interaction.

Those who take on this challenge today will achieve the new level of continuous insight and understanding needed to lead in the post-digital world.

A close-up photograph of a woman with long brown hair, wearing a yellow top, focused on working on a circuit board. She is using blue tweezers to handle a small component. The background is dark and out of focus, with some blue light reflecting off the board and her hands.

TREND 3 **HUMAN+** **WORKER**

**Change the workplace
or hinder the workforce**

Businesses have not been going through their digital transformations alone. The workforce is becoming “human+”: each individual is empowered by their skillsets and knowledge plus a new, constantly growing set of capabilities made possible through technology.

As the line between employees and the technologies they use blurs, a new digital divide is emerging. Seventy-one percent of business and IT executives in Accenture’s survey agree that their employees are more digitally mature than their organization, resulting in a workforce “waiting” for the organization to catch up.

Digital disruption has effectively transformed the *what, how, who* and *why* of work with a focus on consumerism. People now also expect consumer-like, personalized and differentiated work experiences with increased transparency. While the current workforce has been patient during this change, the future workforce will simply choose their employers based on the work experience.

As the workplace is changing, businesses must likewise change how they engage their workforce and teams to help them remain effective stewards of their business. The workforce needs to be at the heart of their redesign, which means asking them specifically what they want from your organization and what they need to succeed in their jobs. Designing in isolation will only result in gaps in understanding and risks of investing in the wrong areas.

71%

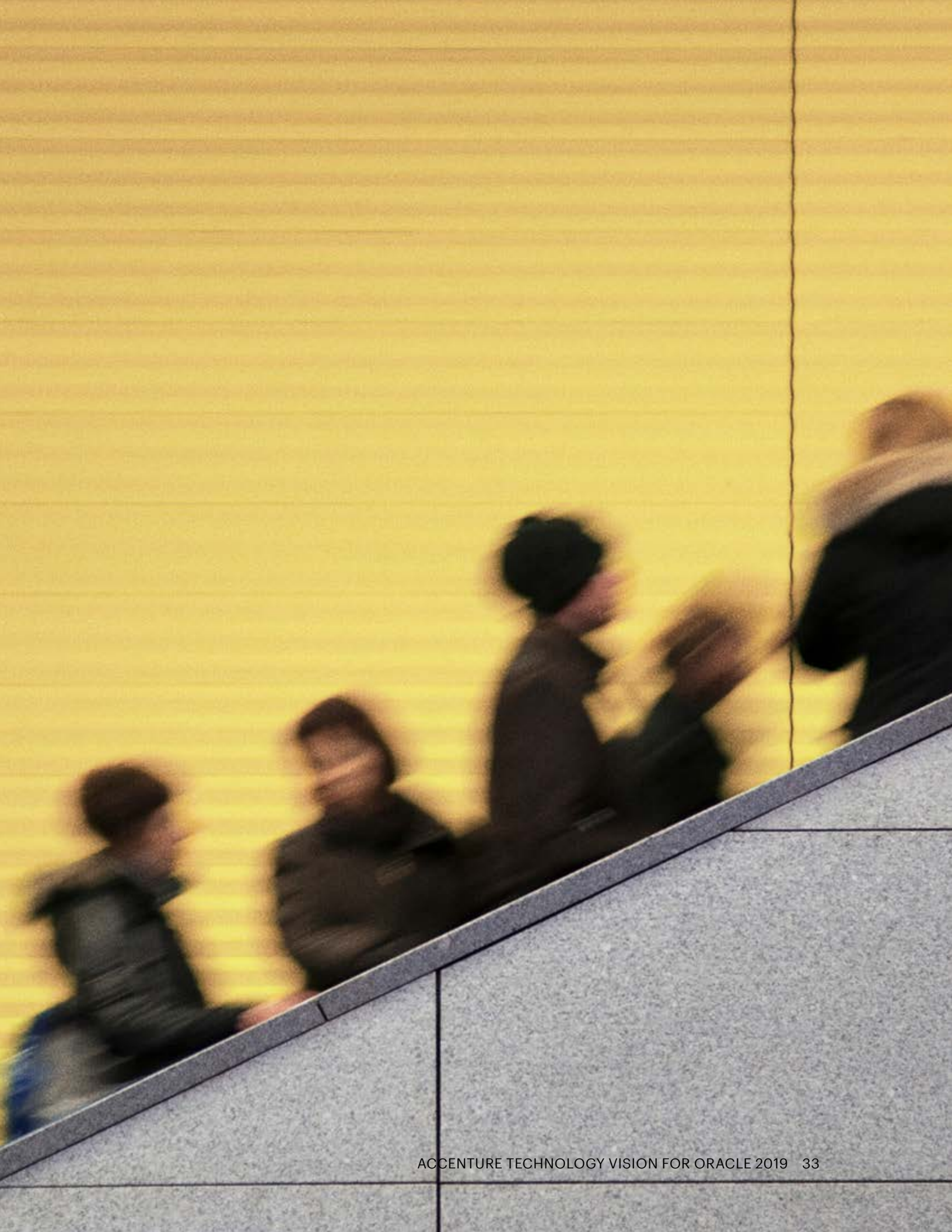
of business and IT execs agree, employees are more digitally mature than their organization.

CATCHING UP TO THE WORKFORCE

In concert with this shift to human+, people are moving more rapidly between companies. The median years of tenure with a US wage or salary worker's current employer dropped from 4.6 in 2012 to 4.2 in 2016.⁹ Among those between the ages of 25 and 34, the median tenure with one company is now less than three years.

Technology innovation combined with increasing employee velocity has created an ever-expanding number of potential paths for workers to explore. But that also means an increasing number of career paths for businesses to identify, manage and support—and so far, companies have not kept up. Talent-finding strategies are out of sync with the capabilities of human+ workers, and investments in learning and reskilling are far short of where they need to be for the high rate of employee transitions to different roles or companies.

LINX Cargo Care Group, a logistics provider in Australia and New Zealand, was able to support its future growth by helping human resources (HR) proactively identify and retain high-potential or at-risk talent and establish a succession plan using Oracle Talent Review and Succession Management Cloud Service. LINX also managed to halve the admin workload of its HR staff for entering information for up to 20 new hires each month. Candidates were provided self-service capabilities via Oracle Talent Acquisition Cloud, enabling them to easily add or change personal details, such as qualifications and work experience.¹⁰



OPTIMIZING THE WORKFORCE MIX

The speed and constantly changing nature of human+ career journeys are making it harder for companies to add specific skills to their workforce through traditional hiring approaches.

So, companies are rethinking the way they hire, using technology to assess candidates based on capabilities and potential—an approach that is better suited to the adaptability of the human+ workforce. Leaders are already using this as an advantage, moving away from solely reactive skills-based hiring and looking toward an optimized mix of people.

Unilever has revamped its entry-level hiring process with this in mind. Interested candidates begin with a screening process that includes a series of short games, designed to assess a person's potential fit based on traits like memory, acceptance of risk, and whether the person is more likely to read contextual or emotional cues.¹¹ An AI-based tool reviews the results, eschewing traditional résumé-based evaluation in favor of optimizing for potential. There's no "wrong" result; the trait profiles help Unilever better match candidates to open roles.

Following an initial effort in North America, Unilever saw its applications-to-jobs numbers double within the first 90 days, and the average time to hire a candidate drop from four months to four weeks. It also saw higher acceptance rates for offers and a major increase in diversity among new joiners. After one year, the number of universities represented among entry-level Unilever hires increased from 840 to 2,600. The company later expanded the hiring approach and program to 68 countries.

In the war for talent, leaders are recognizing that the most important thing about employees is not where they come from, but how far they can go. By adapting their technology strategies, companies can identify strong candidates for open roles, and later, match employees with the training needed to prepare for a role switch.

BUT REMEMBER, PEOPLE FIRST

As companies look to connect data and technology, the emphasis should be on understanding human needs first. Businesses must address the different demographics and career journeys of potential candidates during the recruiting process today, requiring more customized interactions.

Human capital management (HCM) solutions such as Oracle HCM are helping to enable such customized interactions. Companies are leveraging social systems to personalize recruitment for college campuses versus experienced hire professional candidates.

Combining AI and machine learning (ML) with data as a service (DaaS), Oracle HCM Cloud helps companies recruit and hire employees that can best address their business needs.

Companies target individuals based on their specific hobbies and areas of interest through the creation of customized recruiting ads. Leveraging social network information, they can also recruit within networks, customizing the profiles of potential hires to focus on the types of individuals who have been successful at their companies.

BETTER WITH BOTS

ACCENTURE DIGITAL ASSISTANT FOR ORACLE CLOUD

The Accenture Digital Assistant for Oracle Cloud was created to extend the value of Oracle Cloud. The solution uses sophisticated chatbots enabled with natural language processing and ML. They have the ability to learn and become part of an organization's ecosystem, operating in effect as "associates."

Key considerations for helping to truly drive the associate experience for clients are to:

- Align with the moments that matter.
- Streamline and standardize processes.
- Enable analytics to insights.
- Leverage robust and scalable technologies.

Multiple clients across numerous industries are now in process to use this ground-breaking innovation. Clients are leveraging the digital assistant solution due to its simplicity and ease of use across their employee base without the need for training. The solution is intuitive, similar to using mobile phone text messaging. The user never has to log into the actual cloud service where training would be needed, helping to eliminate the expense for companies.

The digital assistant solution is customized to work across key use cases that our clients request. Examples include: finance chatbots that integrate with Accenture's health and public-sector industry solutions to handle tasks such as requisition creation and approval reviews; and a client-tailored HR helpdesk chatbot used to address common requests. These solutions reduce the day-to-day effort for remedial tasks. They also facilitate and improve engagement among a client's employees or customers with the business and underlying systems, enabling clients to realize additional value from their Oracle services investment.



TREND 4
SECURE
US TO
SECURE
ME

**Use technology as the
first line of defense in an
interconnected world**

Today's ecosystem-dependent business world amplifies the impact of cyberattacks, making security a bigger-than-ever priority for trusted relationships. An incident that strikes one enterprise can spread like wildfire across its ecosystem of partners and beyond. While companies find rich opportunity working in ecosystems, they also extend and absorb their partners' risks and vulnerabilities.

Security is a burning business need in today's interconnected world—and presents an opportunity for creating business relationships based on trust. Eighty-one percent of executives in Accenture's survey agree that security has become a competitive differentiator for their organization. By differentiating themselves as trustworthy defenders, companies will become more attractive partners for other businesses, governments and consumers alike.

The nature of cyberattacks are continually changing, growing more sophisticated and pervasive—and the impact and costs for business are vast. While most businesses still look at cybersecurity as strictly an individual effort, threat actors see ecosystems as an ever-widening attack surface.

81%
of executives
see security as
a competitive
differentiator for
their organization.

A WIDER FOCUS ON SECURITY

Eighty-seven percent of business and IT executives included in Accenture's survey agree that to be truly resilient, organizations must rethink their approach to security in a way that defends not just themselves but also their ecosystems. Only **29 percent** of the executives, however, report that they know their ecosystem partners are working diligently, like they are, to be compliant and resilient about security.

To respond to this dichotomy, organizations must include growing ecosystem dependencies as part of their own security posture and make security a cardinal component to build trusted partnerships. Leaders are recognizing that while they already collaborate to deliver best-in-class products, services and experiences, it is high time security joins that effort as well.

REFRAMING RISK AROUND THE ECOSYSTEM

If enterprises hope to collaborate on security across their ecosystem, the first step is reframing their understanding of threats and the subsequent risk those threats pose.

In a recent Accenture survey, **71 percent** of IT and business executives felt that cyberattacks were a “black box” and did not know how they would affect the organization.¹² If leaders cannot assess the impact of an attack on their own organization, how will they understand the risk posed to their ecosystem partners—or the risks they are accepting through those partnerships?

Consider how Strava, a fitness app, had to suspend services after it was discovered that the app’s anonymized activity map was inadvertently uncovering classified US military sites as soldiers tracked their workouts.¹³ The data did not present significant risk to Strava or any privacy risk to individuals, as it was aggregated and not personally identifying. But it was this very aggregation, coupled with free access to the information, that generated substantial risk for a subset of the company’s customer base—and, in fact, for a large group of *non*-Strava users as well.

In effect, data security and digital trust are imperatives born out of today’s data-driven platform economy. Data is the linchpin of a connected world. As the volume of data flowing through the business world grows exponentially, so do the risks for compromise through cyber threats. Wherever data flows, security must go with it—without security, businesses cannot trust to use and share the data that underpins their operations.

GROWING DATA SECURITY CHALLENGES

As the potential for cyber threats and need for security have grown rapidly, a shortage of security specialists in the marketplace has conversely resulted.

How do you mind this talent gap? Start by looking at your teams differently today—while there is a shortage of security specialists, there is a surplus of database talent. Since attacks are on data, database talent can be retrained to assume more security-oriented roles.

Recognize, however, that the task of securing data today is far too big and complex. You can never expect to produce or retrain a human army big enough to cover the ever-widening attack surface—businesses today need to use technology as the first line of defense.



FROM DEVOPS TO DEVSECOPS

DevOps (development and operations) offers an agile approach to code development where design, analysis and testing are continuous processes.

But without the right security tooling, this approach can expose businesses to potential hacks. Embracing DevSecOps, integrating security throughout development processes should be a priority.

In a common scenario, a hacker generally comes in through a DevOps environment. Once they're in, they can network their way into a company's production environment and start to compromise its data.

Accenture also uncovered another common area for exposure through security assessments that it conducts for clients. As Accenture has used its purpose-built tools for Oracle security to run checks on clients' systems, it is not uncommon that we find the default password has never been changed in DevOps environments.

AN AUTONOMOUS ANSWER

A major benefit of leveraging a solution like Oracle Autonomous Database is that security is controlled and managed by the vendor.

For example, Oracle's security monitoring capability is alerted when new threats emerge and immediately issues and applies any necessary updates or patches on these cloud-based database services. Security threats are addressed without any downing of the service itself, removing the risk and the associated cost.

From solutions built for speed that get you to the cloud in six months or less to full enterprise platforms purchased on a subscription basis, Oracle Cloud Suite offerings also leverage a state-of-the-art security operations center (SOC) at the cloud's core. AI, ML, layered security from the core to the edge and patching are used for protecting against hackers that try to penetrate its cloud. Oracle's SOC pushes hackers over to a non-client environment to actually watch them hack and learn how they're doing it using AI and ML. Any at-risk ports of entry across the cloud are then quickly identified and closed to remove the risk.

BUILDING A MORE RESILIENT FUTURE

As companies pursue and complete their digital journeys, they will find themselves operating in new and different ecosystems to chase innovative opportunities—and that means a constantly expanding attack surface for threats and vulnerabilities. If they are going to join in the pursuit of shared business outcomes, they need to coordinate their efforts for resilience as well.

TREND 5

MYMARKETS

**Meet consumers' needs
at the speed of now**

With companies, workforces, consumers and industries now inextricably connected, being digital is no longer enough for a business to differentiate itself. But it does give organizations a foothold for their next big opportunity: capturing moments through the use of data.

Eighty-five percent of business and IT executives in Accenture's survey agree that the integration of customization and real-time delivery is the next big wave of competitive advantage. But before companies can deliver for a given moment, they have to know that the opportunity exists. With direct digital access to customers and increasingly powerful analytics capabilities, companies can make use of data to better understand their current and potential markets better than ever before.

And with sophisticated backend technology that can reorient the business quickly, they can deliver for those momentary markets faster than ever before. Put those capabilities together and every moment is a chance to deliver a new product or service designed not just for a specific customer, but for their needs at a specific point in time.



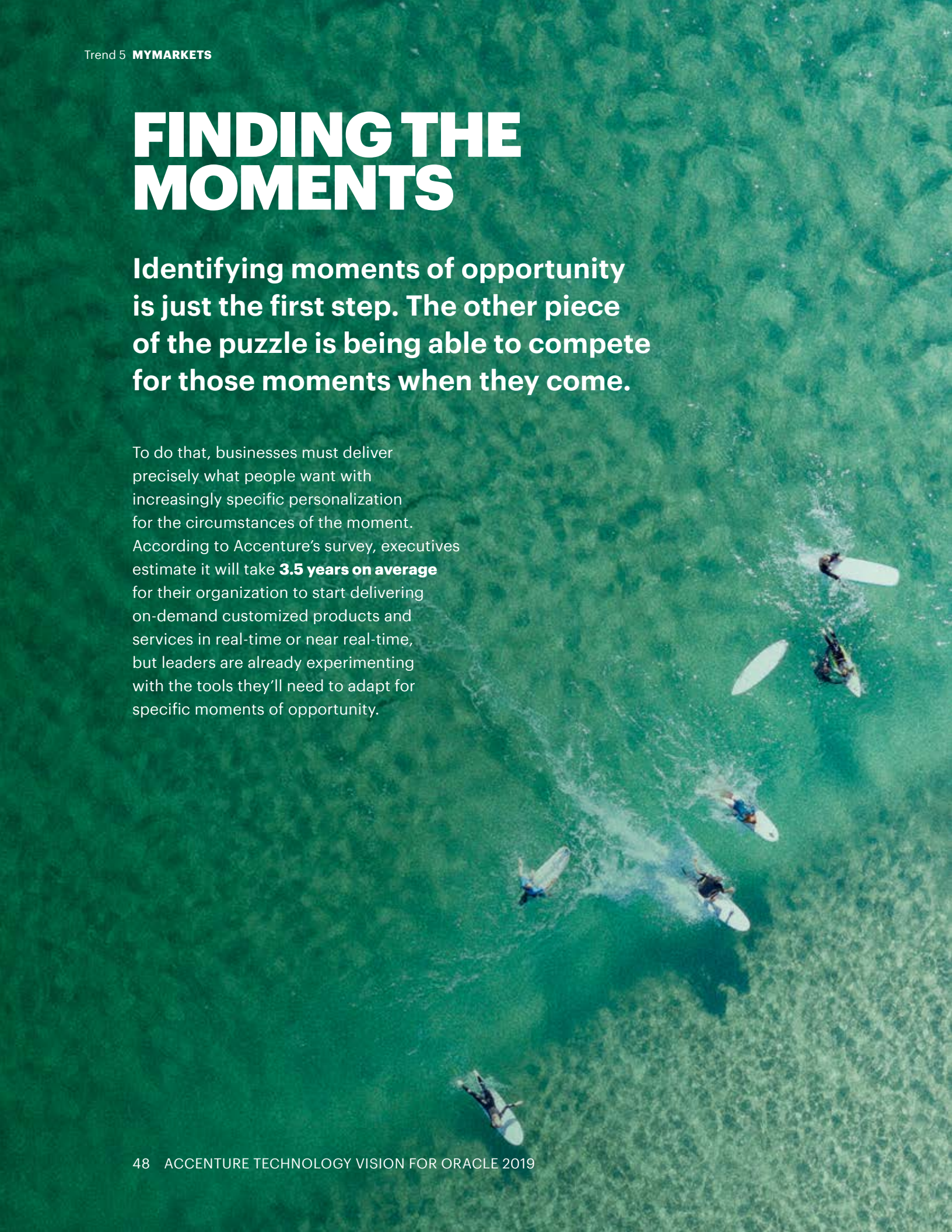
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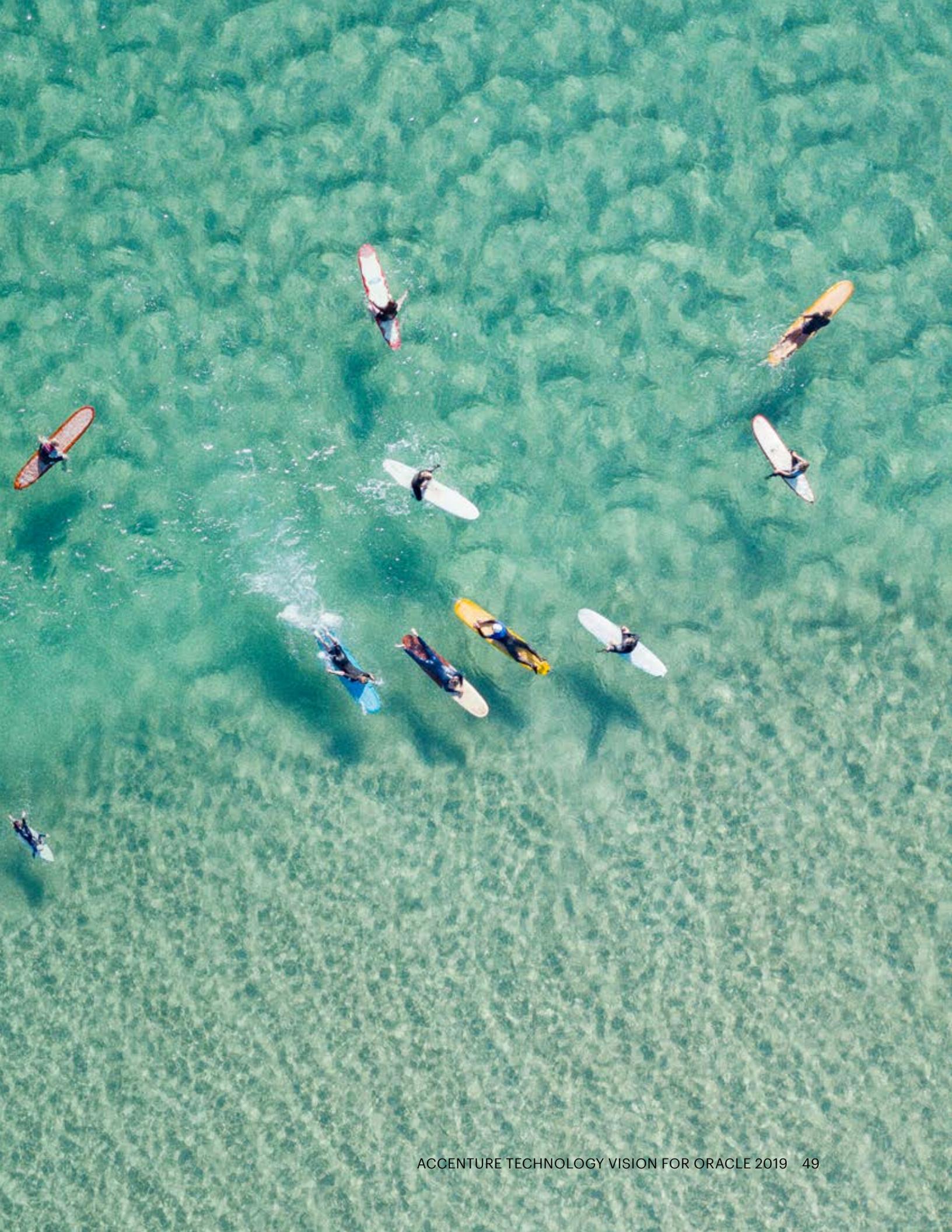
**of executives see integration
of customization and real-time
delivery as the next big wave
of customer advantage.**

FINDING THE MOMENTS

Identifying moments of opportunity is just the first step. The other piece of the puzzle is being able to compete for those moments when they come.

To do that, businesses must deliver precisely what people want with increasingly specific personalization for the circumstances of the moment. According to Accenture's survey, executives estimate it will take **3.5 years on average** for their organization to start delivering on-demand customized products and services in real-time or near real-time, but leaders are already experimenting with the tools they'll need to adapt for specific moments of opportunity.





ENABLING MOMENTS WITH ORACLE

Oracle predictive analytics and business intelligence capabilities are helping businesses transform their data into opportunities for meeting customers where they are and making the right business decisions for enabling new growth.

Stitch Fix is an online personal style service on a mission to change the way people find clothes they love.¹⁴ The company combines data science, automation, and AI and machine learning (ML) technologies with the personal human touch of seasoned style experts.¹⁵

The Stitch Fix experience is a truly data-driven, one-to-one personalized styling that helps customers look great with a perfect fit while saving them time by skipping the trip to a store. Blending the human element of personal styling with high-quality clothing and proprietary algorithms, Stitch Fix stylists help discover and hand-select clothing for customers based on their unique style profile and size. Stitch Fix then ships their clothing items directly to be tried on at home for an effortless and convenient customer shopping experience.¹⁶

Stitch Fix's cloud-first strategy includes the implementation of Oracle ERP Cloud as the enabling platform for growing and scaling its business. The Oracle Cloud-based solution is being used today to manage the company's backend finance operations to help automate the mundane so its human talent can focus more on serving as business strategists. Leveraging the continuous technology advancements available through Oracle Cloud, Stitch Fix can remain focused on growing its business.¹⁷

DELIVERING MORE PERSONALIZATION

Accenture and Oracle are also delivering other solutions for clients that get to the one-to-one level of personalization.

For example, we're implementing the Oracle Eloqua marketing automation solution, part of Oracle's Marketing Cloud, to help clients collect and leverage information about different customer behaviors. Infused with AI and ML technology capabilities, Oracle Eloqua helps transform large amounts of data into specific recommendations for enabling greater personalization in targeted email marketing campaigns.

Oracle CX Unity is another new customer intelligence platform that is embedded within Oracle CX Cloud. It recognizes that customer interactions are non-linear and unpredictable, and that there is no such thing as a fixed, 360-degree view of the customer. Oracle CX Unity brings together online, offline and third-party customer data sources in context, in motion and in real time to help ensure that each and every customer interaction is data-driven.

Another related solution, Oracle ID Graph, leverages the powerful technologies of both the Oracle Marketing Cloud and Oracle Data Cloud to unite disparate data sources to form a unique, singular profile of consumers. This allows marketers to focus their efforts on people-based marketing for driving improvements through their personalization and contextualization programs. All linkages in Oracle ID Graph are continuously validated and scored, which changes dynamically based on a proprietary algorithm with only the linkages deemed accurate accepted.

ACCENTURE MYCONCERTO

**Helps clients transform the
vision into reality for Oracle**

Accenture myConcerto for Oracle is how we are bringing together and to reality all these exciting technology innovations for our clients to help them succeed as post-digital businesses. MyConcerto provides the insight-driven, digitally integrated platform that we use to help clients envision, innovate, develop and deliver end-to-end solutions based on Oracle technologies—guiding them through their digital transformations to intelligent enterprises.

Through the myConcerto platform, Accenture is enabled to deliver greater value to clients, helping to:

- Accelerate and de-risk their journey through well-proven and best in-class methods.
- Provide a value-led approach to achieve faster ROI.
- Power their enterprise transformation—from business case and roadmap through delivery and continuous improvement.

Accenture myConcerto covers the entire Oracle Cloud stack—including software as a service, platform as a service, infrastructure as a service, data as a service, Internet of things, analytics, automation and autonomous services, blockchain and more.

Integrating Accenture’s deep industry knowledge, intelligence and innovation, myConcerto delivers it as a comprehensive digital suite that:

- Facilitates design thinking.
- Analyzes the business to discover value.
- Uses intelligence to automatically create a customized business case and roadmap.
- Guides the journey to becoming an intelligent enterprise.

MyConcerto accelerates value in a variety of ways: intelligently analyzing and advising on roadmaps; supporting technological solutions by leveraging Accenture preconfigured industry and business-function solutions; and embedding leading practices and the latest innovations from Accenture and Oracle. The suite is constantly updated with new insights, technologies and solutions, helping to enable collaborative innovation for maximum business outcomes.



DISCOVER
with Insight



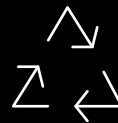
DESCRIBE
with Impact



CO-CREATE
with Agility



SCALE
with Excellence



SUSTAIN
with Improvement

DON'T WAIT TO CREATE

**OWN YOUR
FUTURE,
APPLYING
THE NEW,
NOW**

The post-digital era has arrived. The next wave of technology innovations is already shaping business—and we're applying them today for our clients. Oracle technology is playing a pivotal role in helping to shape this exciting new era of innovation and the solutions Accenture is delivering for clients.

Leaders are taking advantage of emerging technologies with an emphasis on mastering their use of data through powerful cloud analytics. Oracle Cloud is providing an enabling platform with embedded analytics for leveraging intelligent, data-driven insights into individual product, service and technology preferences.

To create continued success in the post-digital world, leaders are basing their management and operational decisions and actions on rich analytics insights. At the same time, they are assuming massive responsibility in managing customer, employee and societal expectations around the use of data—it's a tall but attainable order.

Everything they do with data is being underscored by security as a top priority for the protection of their own business interests as well as those of their customers and ecosystem partners in an increasingly interconnected, post-digital world.

Leaders recognize trusted data as a key competitive differentiator for the basis of forming and maintaining business relationships.

Post-digital leaders also understand the importance of putting people at the heart of their technology design. They are focusing on opportunities to propel their business forward by augmenting human capability with technology.

Tremendous potential awaits your business to drive new growth and greater value from data—delivering for any moment in any reality. Oracle Cloud is purpose-built to enable your journey forward, allowing you to rapidly innovate while opening new conduits to drive growth and value. Now is the time to begin shaping your business's post-digital vision and turning it into reality.

- Complete your digital transformation.
- Strengthen trust in the way you secure and store data.
- Ensure responsible stewardship with the use of data.
- Drive greater value from your data.

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