



From always connected to omni-connected

Creating value for people and business
through omni-connected experiences

Contents

03

Introduction

19

Our change journey in action

04

Defining omni-connected experiences

22

Make the (omni) connection

09

Creating value through omni-connected experiences: 4 key actions

24

About the research

Introduction

Our devices may be always on. But our research found that only one in six people feel highly connected—in a human sense—at work. And not just connected to their organization, but to the people they work for and with.

Trust within teams is declining, too. Only one in five people feel comfortable sharing problems or raising conflicts with colleagues. Only one in four report that leaders are responsive to their needs, communicate regularly and feel that team members are treated equally.

Think about that for a moment. Only a small fraction of any team—your team—feel like they are truly connecting on a human level.

Technology has and continues to be an essential accelerator of human connection—helping people learn, collaborate and turn data to insight. Organizations now must take the next step and turn these interactions into omni-connected experiences that create value for both

people and business. In fact, organizations in which people feel highly connected to each other, their leaders and their work, stand to gain a 7.4% revenue growth boost per year.

Read on to learn how to create value through omni-connected experiences.

Value at stake

Organizations in which people feel highly connected to each other, their leaders and their work, stand to gain a 7.4% revenue growth boost per year.





Defining omni-connected experiences

From always connected to omni-connected: Creating omni-connected experiences to strengthen culture, deepen trust and drive results

Omni-connected experiences level the playing field so everyone can have an equitable experience and participate fully—regardless of location. Through these experiences people are able to forge relationships, create both personal and business value and impact, and grow their careers.

What omni-connected experiences are NOT

Omni-connected experiences do not mean being always on or connected 24/7. Quite the opposite. People who benefit from omni-connected experiences have stronger relationships within their organization. As a result, they can more easily step away from work and disconnect in a good way—to strengthen their resilience, fuel their creativity and remain highly productive.

4 key actions to create value through omni-connected experiences

1

Instill modern leadership

Lead with empathy, compassion, transparency and trustworthiness

2

Grow a thriving culture

Nurture cultural norms that prioritize purpose, authenticity and psychological safety

3

Enable the agile organization

Take flexibility further and scale new ways of working

4

Empower people through technology

Provide access to a robust foundation and the ability to experiment

The omni-connected premium

People and business both benefit from omni-connected experiences in meaningful ways:

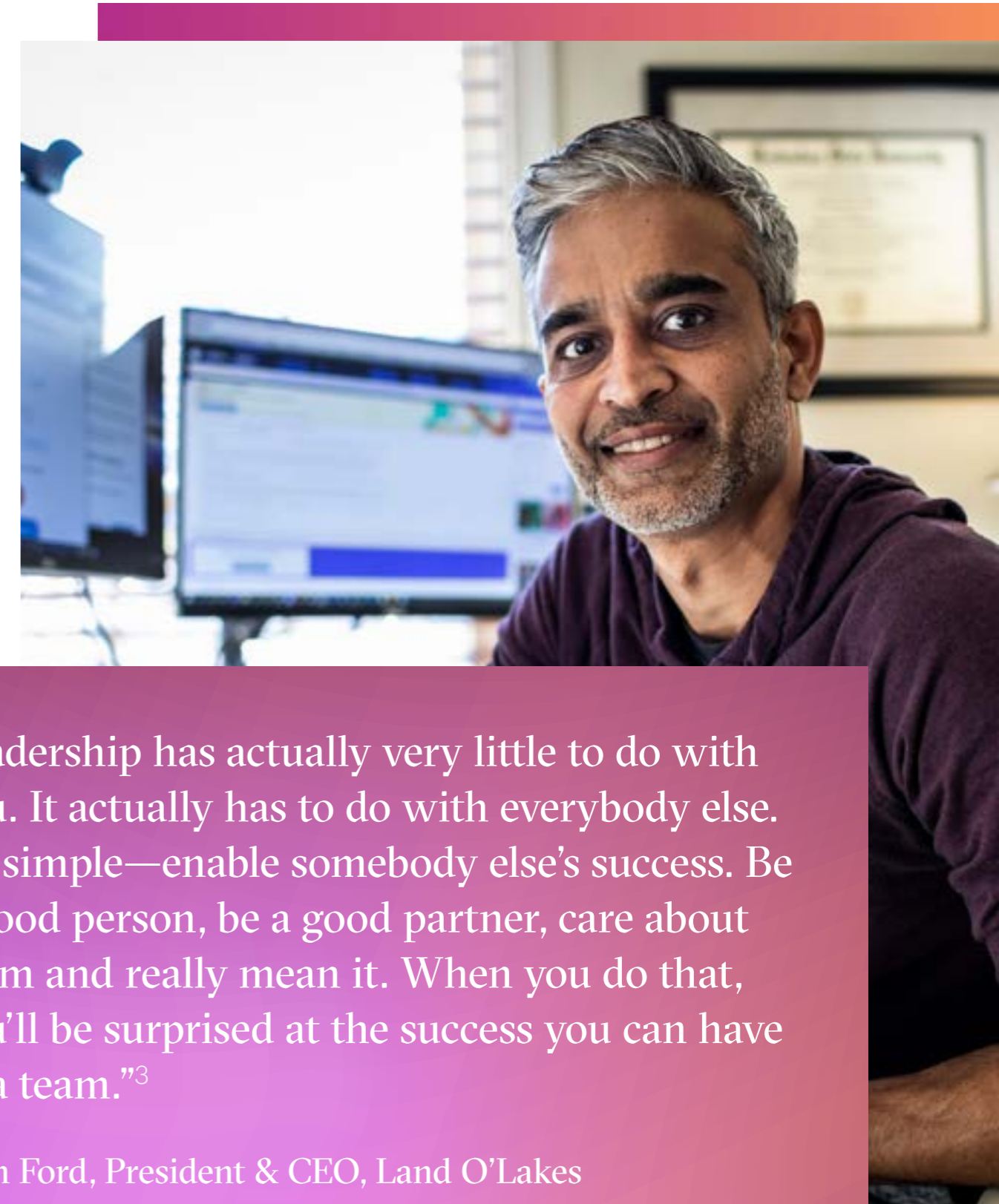
Financial: Omni-connected companies experience a 7.4% revenue growth premium per year.¹

Trust: People benefiting from omni-connected experiences are 29% more likely to experience a deeper level of trust toward their organization and team. Where there's greater trust, people are 35% more likely to deliver high-quality work and nurture work relationships that, among other things, foster innovation.

Retention: Being omni-connected accounts for 59% of an employee's intention to stay. When the cultural norms of the company have people feeling that they work for a purposeful organization, that they can create value and be effective in their team, they're more likely to stay. These all matter more than a slightly bigger paycheck.

Productivity: Of employees who benefit from omni-connected experiences, over 90% say they can be productive anywhere—and that's not just perception. In a 2021 study by the University of Chicago and the Mexico Autonomous Institute of Technology, 40% of respondents found their work-from-home productivity to be greater than when they're on-site (just 15% felt the opposite).²

Yet **only 17%** of the people we surveyed felt they were benefitting from omni-connected experiences at work. The opportunity is there to seize.



“Leadership has actually very little to do with you. It actually has to do with everybody else. It's simple—enable somebody else's success. Be a good person, be a good partner, care about them and really mean it. When you do that, you'll be surprised at the success you can have as a team.”³

Beth Ford, President & CEO, Land O'Lakes

Why this matters now

Culture and talent are top of mind in the C-suite...

Organization culture and the impact of the pandemic on culture was a topic in 53% of company earnings calls we analyzed between January 2020 and April 2022.⁴ And one in two CEOs are investing to unlock people's potential to drive their business transformations.⁵

CEOs must also consider the mental health epidemic—where the stress of the pandemic, isolation, social upheaval, widening equity gaps and the global impacts of the war in Ukraine are taking an even greater toll on people's resilience.

Coupled with this strain are significant economic challenges—from supply chain disruptions to rising inflation to the tightest talent market we've seen in decades. Talent pools are shrinking, and many people are fundamentally re-thinking their relationship with work—out of choice or necessity.

Research from MIT suggests that social isolation at work was growing even before the pandemic started.⁶ And one might think a quick fix is simply to bring everyone back to work on-site and human connection will happen. It's not that simple. In fact, 42% of survey respondents who work on-site reported being less connected than people working in a hybrid model (36%) or fully remote (22%). Why? They lacked flexibility and the tools to be most productive and connected, and they experienced a greater sense of inequity.

...but something is missing

People are not only experiencing a new world of work but living in a new world. It's no surprise, then, that people's fundamental idea of how to connect has also changed dramatically. And even though culture is on the minds of CEOs, are they truly looking at it as a strategic differentiator?

Currently, too many conversations about culture are still anchored to space and place. And people say leaders generally overestimate the connectedness of their people by 2x.

Organizational culture and supporting people within it can and should be the accelerator to seizing opportunities now and into the future. Omni-connected experiences that result in a heightened sense of personal—and measurable business—impact truly thrive through vibrant, human relationships.

Leaders generally overestimate the connectedness of their people by 2x.

Start by meeting human needs to unlock people's full potential at work

Our Net Better off framework sets the foundation for omni-connected experiences

Are people Net Better Off working at your company?

Our [Net Better Off](#) framework uncovered the six human needs that contribute to unlocking two-thirds of a person's potential at work (see figure 1). And leaving people net better off by meeting these needs is the single most important predictor of successful omni-connected experiences.

The majority of organizations invest most in the Financial & Employable needs—a job and a paycheck. Yet what matters more to unlocking potential are the Emotional & Mental, Relational and Purposeful needs.

A strong sense of inclusion and tools to support mental resilience are critical to helping people feel Net Better Off at work, yet there's a gap in what people need and what leaders provide.

Just one-fourth (26%) of those surveyed said that their organization has provided them with the physical and mental support they need to be productive and to collaborate during these difficult times. 27% of employees feel like they truly belong and bring their authentic selves to the workplace.

And only one in four feel that their company cares about them.

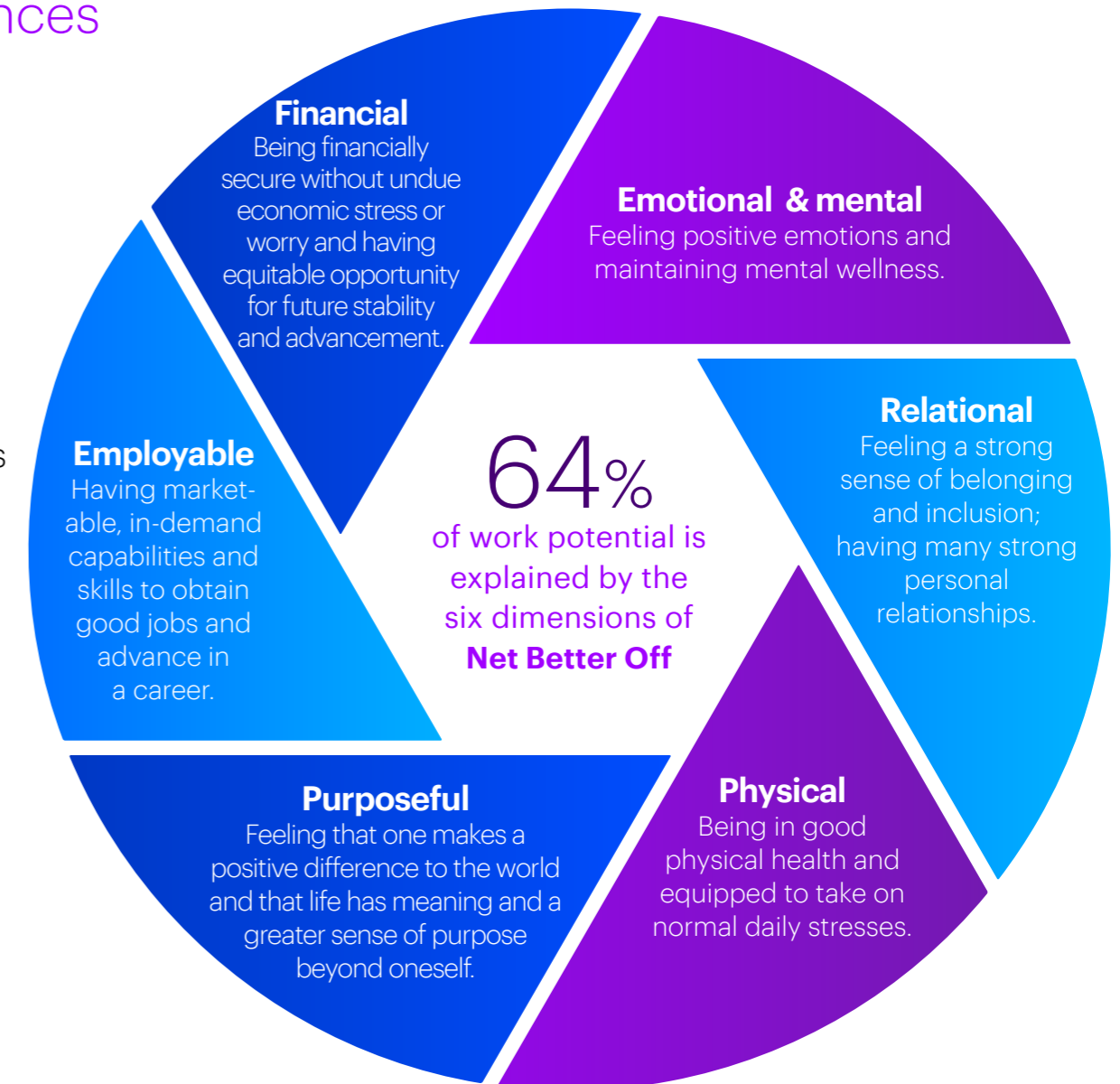


Figure 1
Net Better Off addresses fundamental human needs.



Creating value through omni-connected experiences: 4 key actions

From always connected to omni-connected: Creating omni-connected experiences to strengthen culture, deepen trust and drive results

We developed insights from 1,100 C-level executives and 5,000 workers working in multiple roles and ways—front-line and fully on-site, hybrid and fully remote—across 12 countries.

Our findings also build on our prior research, focused on the benefits of leaving people Net Better Off at work.

In doing so, we've identified the key actions companies can take to create value for people and business through omni-connected employee experiences.



“ You need to communicate like crazy, be transparent about everything you’re doing all the time. You can’t communicate enough in this environment. Keep communicating and finding ways, digitally or otherwise, to keep people connected to your purpose. People need to know why they work for your company and if they don’t, they’re not going to work for you very long.”⁷

Chris Nassetta, President & CEO, Hilton

1

Instill modern leadership: Lead with empathy, transparency and trustworthiness

Create connections in safe places. It's one thing to make people feel safe and able to share their ideas and perspectives. It's another thing entirely to ensure that leaders return that honesty with compassion and trust. Organizations need to invest in developing leaders who make individuals feel safe and respected. No one should feel diminished because they chose to speak up or show vulnerability.

Be transparent to build trust. Feeling out of the loop, not understanding how your work contributes to company goals or lacking constructive feedback causes significant disconnection. Leaders must be willing to communicate openly and with compassion all the time, not just in times of crisis. Not only must they role model this themselves, they must foster it in their teams.

Listen, learn and act. To inspire trust, leaders need to listen, learn and act—individually and collectively. Start with a robust listening framework to make sure all voices are heard, then turn those insights and ideas into action. When people trust their leaders to listen, act and be transparent about progress and feedback, more and better ideas will follow.



Leadership traits that Modern CEOs are prioritizing⁸:



| Case study |

Healthier brains, healthier business

Networking company **Cisco** has always had one eye on the future—both for its clients' technological needs as well as its employees' needs. Long before belonging or global disruption were top of mind across C-suites, Cisco built a psychologically safe culture based on trust. When the pandemic arrived, 87% of Cisco's people already viewed the company as a psychologically and emotionally healthy workplace, so they were better prepared and supported for work under new, stressful conditions. To be sure, the C-suite held regular 75-minute check-ins to listen to employees and address questions, and also launched a 100-day "sprint" to tackle areas of racial inequity within the company. It's all part of a "conscious culture" that's woven into everything Cisco does, and it's also why the company has held the #1 spot on *Fortune's* list of "100 Best Companies to Work for," two years in a row.⁹

With its commitment to mental health, Cisco remains focused on creating an environment in which people *want* to work, not necessarily one where they have to work.



▼ Employees don't want to be employees, they don't want to work for managers and they don't want to work for executives. They want to be human beings who work for other human beings. And I think authenticity and the importance of being human, understanding the things they're dealing with as humans, and building that into how you approach them in your day-to-day work with them, is so important."¹⁰

Chuck Robbins, Chair & CEO, Cisco

2

Grow thriving culture:

Nurture cultural norms that prioritize purpose, authenticity and psychological safety

Connect people to purpose. The more that people understand how the work they do is aligned with the company's greater purpose (beyond boosting the bottom line), the more fulfilled and driven they will be. People become even more engaged when they can expand their skills and grow. Investing in people's development and helping them achieve their aspirations is a clear signal to them that the work they do has meaning.

Make it safe to be yourself. When people can demonstrate their strong sense of self, they forge stronger connections with their team. But this assumes leaders are creating safe spaces for people to be heard and seen—and demonstrating that different ideas and experiences matter to the success of the organization. Along with providing mental resilience resources and tools, leaders must be willing to show their own vulnerability and focus on self-care, which gives their team agency to do the same.



| Case study |

Safety first

It's easy to assume that a company like **Atlassian**, which creates collaboration tools, also has a culture of collaboration. It does—but it took dedication and a commitment to creating an environment based on psychological safety so that people can feel comfortable speaking up. The idea is that anyone is empowered to be an internal entrepreneur, with access to the resources they need to turn an idea into a new source of revenue. At Atlassian, people do rather than wait for instructions, all because they know they have the safety and freedom to speak up.

They also have the freedom to choose when and where they work. Under Atlassian's "Team Anywhere" model, people can work in any region where the company has a base and are compensated based on local labor costs. In-person experiences are valued, so everyone is required to be in the office for quarterly events. The company is also planning to create small co-working hubs in various geographies, so the company can build itself around where people want to live.¹¹

Atlassian has proven that when people experience a sense of safety and support, they return that offer of security with increased dedication and performance.



3

Enable the agile organization: Take flexibility further and scale new ways of working

Look beyond where—to what, when and how.

After two-plus years of remote or hybrid work arrangements for millions of people, it's easy to confuse the commute from the bed to the desk with the notion of flexibility. They're not one and the same. Location is only one small piece of the larger idea of flexibility, which should also consider what people work on, when they work and how. Today, fewer than one-fourth of workers surveyed feel they have permission to be flexible and have the autonomy to manage their time to be most productive.

Create a flexibility framework. Flexibility will have a different definition or set of boundaries at every organization and for people in different roles. One size never fits all, not even most. It's up to leaders to gain a clear understanding of where, when and how people work. From there, they can build a flexibility framework—moving away from rigid structures and hierarchies and designing instead around people and connectivity. They can then apply the framework based on people's responsibilities to reach the best solution for the role and the individual.

Redefine what it means to "come to work". The entire notion of "coming to work" is ready for a refresh. That means figuring out how teams can maximize the benefits of both time together and time apart—and what matters most to people to make their commute worthwhile. It also requires thinking ahead and designing for people across multiple types of work locations and arrangements. And just like individuals, the entire organization must be able to pivot quickly, given that work and world circumstances will remain fluid.

What about front-line workers?

Whether it's health practitioners, grocery store clerks or delivery drivers, an estimated 2.7 billion front-line essential workers keep our world working.¹² And while they may not have a choice in work location, there are other areas of flexibility that companies can explore to provide more autonomy in their work experiences—through the tools they use, decisions they make, benefits they select and schedules they keep.

It's also an opportunity to take a more nuanced look at the roles and tasks which may offer greater flexibility when you apply an omni-connection lens. In one example, lab workers were expected to work fully onsite. Yet after analyzing their different responsibilities, they found that certain tasks—like recording lab notes or writing research grants—could be done productively outside the lab.

| Case study |

Flexible is also durable

Finding the flexibility framework and solutions that fit each organization is essential—there is no one-size-fits-all option. **American Express**, which has been on *Fortune's* “100 Best Companies to Work for” list for 22 years, is raising the bar on flexible work in the financial sector. The company recently instituted its Amex Flex work initiative. People will work under one of three designations: onsite (4-5 days per week); hybrid (a mix of remote and in-office days when colleagues can connect); and fully remote. It's just one facet, however, of a broader focus on people's health and well-being.

For example, Amex offers its people access to several free resources, such as wellness coaching, well-being checkups and screenings, counseling, dietician support and on-site and virtual fitness classes. The company also offers 20+ weeks of paid leave for all parents, as well as the opportunity to work for up to four calendar weeks a year from any location, during which people needn't visit an office at all. The general idea is that supported colleagues leads to supported customers.¹³

For Amex, tailoring flexibility to the organization and people's needs drives future growth and innovation.





4

Empower people through technology: Provide access to a robust foundation and the ability to experiment

Establish a robust technology foundation.

Companies that use cloud to build a seamless technology and capability foundation are able to support the ever-changing needs of the business by meeting the ever-changing needs of people. At the start of the pandemic, business continuity for many companies depended on people's equal access to stable internet service and the power of cloud to keep them connected and collaborating. This robust technology foundation is essential to help people work in new ways, wherever they need to be.

Think like a technologist. Armed with access and tools, the next step is to empower people with collaboration technology like Teams, Zoom or WebEx, along with a decent Bluetooth headset. These are still vital, but access isn't empowerment. Companies need to encourage their people to think like technologists and experiment—using the data and tools in their

hands to discover new processes and solutions in their work. When people have this level of autonomy, a stronger sense of connection will take hold along with new levels of innovation.

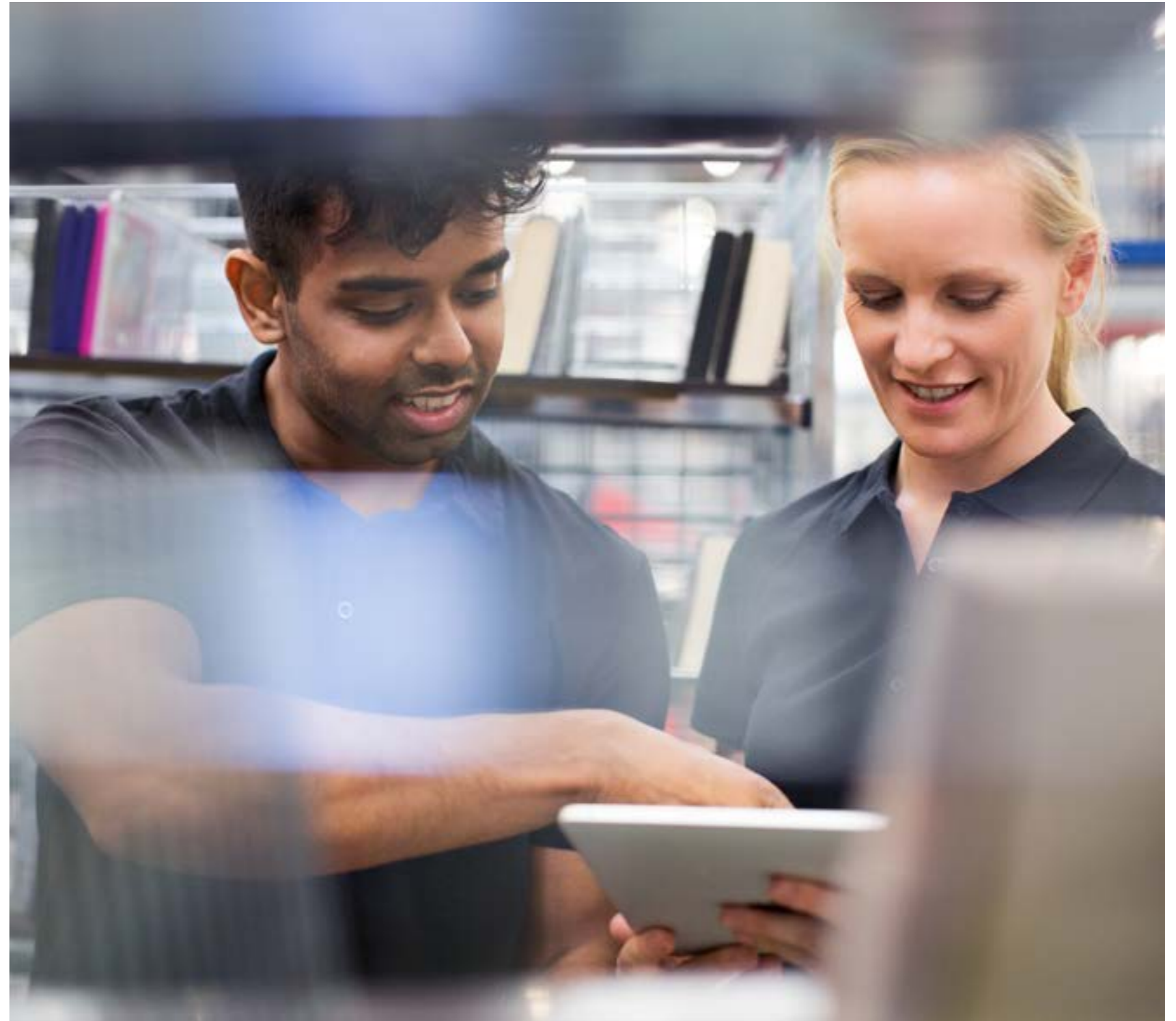
Look beyond the tools of today. Those companies that are expanding their people's technology toolbox, along with their agency, are seeing the benefits. Our research found that 86% of workers surveyed who claim to experience omni-connection also reported upgrades to their company's technology and skillsets, allowing them to work in new ways. That means looking at the upside of emerging technology—like the metaverse—to support equitable opportunities to participate and contribute. It's also worth exploring the promise of human-machine collaboration. By allowing seamless collaboration between humans and machines, people can contribute to higher-value work and experience a greater sense of purpose.

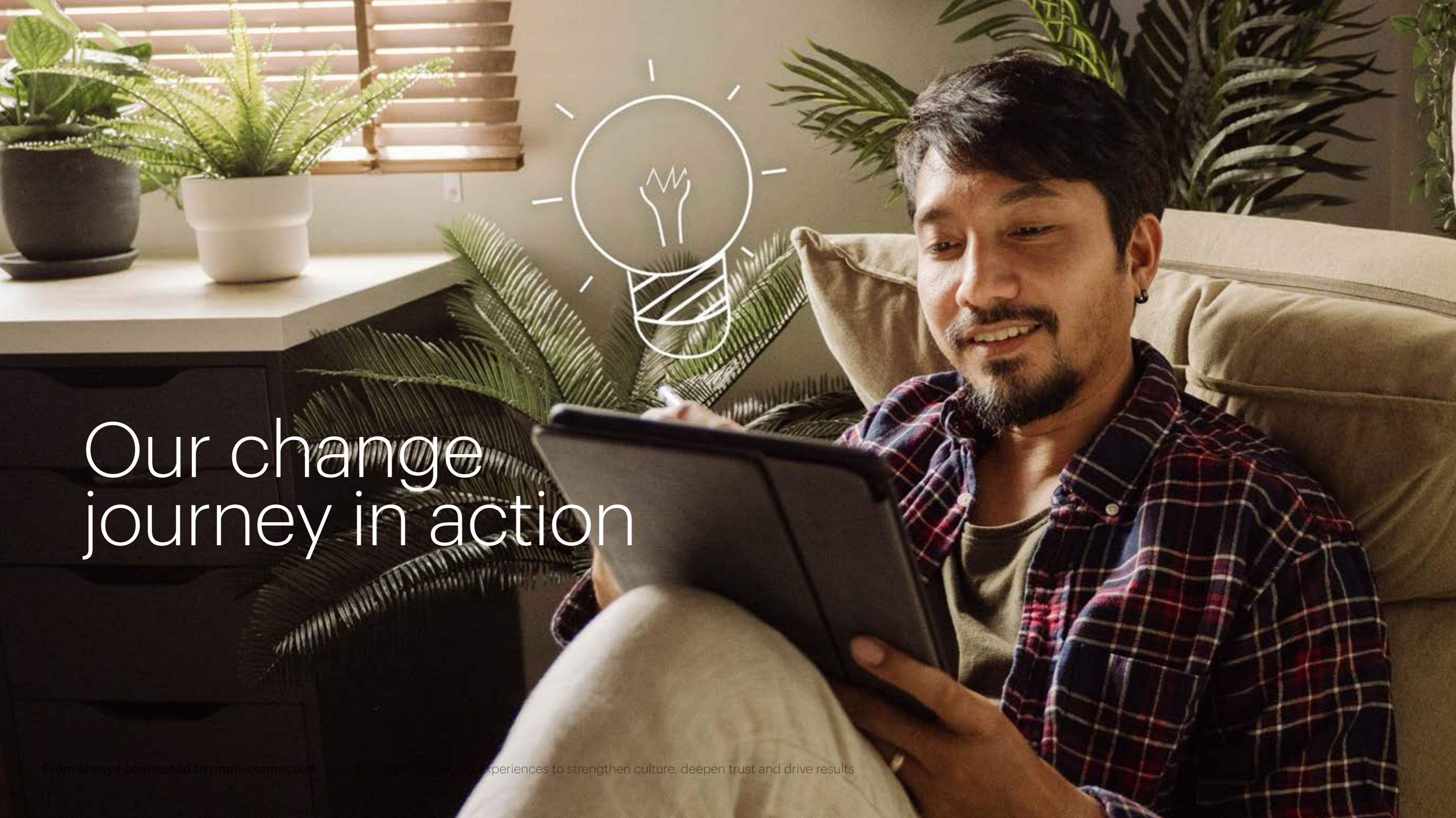
| Case study |

The right tools, not more tools

Walmart, the world's largest retailer, sees technology as essential for supporting its people. Over 700,000 of its front-line workers are being offered a Samsung Galaxy smartphone, paid for by the company and loaded with the We@Walmart app that allows people to clock in and out, connect with colleagues, ask questions of a voice-activated personal assistant and more. Combining multiple tools into one app isn't just good for associates who, through the depths of the pandemic, put in long hours to serve their local communities; it's also good for recruiting in a tight labor market. Walmart is showing its people that it trusts them to use technology in ways that best suit them individually—people can swap shifts through the app, for example—to make their jobs and lives more manageable and flexible.¹⁴

Walmart is letting technology play a supporting role in people's productivity and connectedness—not the starring role.





Our change journey in action

From always connected to omni-connected: Creating omni-connected experiences to strengthen culture, deepen trust and drive results

Accenture is built on omni-connected experiences

That is, we preach the power of omni-connected people because [we've seen the benefits for ourselves](#). In truth, we had an advantage heading into the pandemic, since many of our people around the world had already worked on remote teams for years. So, we were prepared to think about and set in motion a robust plan for helping our people feel even more connected and included, ensuring that they know they belong.

These actions guided our efforts:

1. Meeting the needs of our people through our Net Better Off framework.
2. Completing external benchmarking and also listening to our own people.
3. Examining our own ways of working, how our people connect with each other.

Some key learnings: We discovered that, across all regions, our people value flexibility most, along with working collaboratively and engaging in meaningful, in-person conversations.

We always remind ourselves, as we do with our clients, that the work of being omni-connected and strengthening culture doesn't end—it evolves. As we embrace continuous change, the journey involves listening to your people, gauging progress and acting with intention to close gaps.

We apply a sophisticated listening framework that includes our [Transformation GPS](#) tool to establish a baseline, track progress on our change journey by understanding our people's experience, and continually power our transformation—benchmarked against 500 organizations around the world.



“ In the future, successful companies will do three things with respect to talent. They will be able to access talent. They will be talent creators, not just consumers, unlocking the potential of talent. And they will use technology to complement talent...Those three things are what great companies have to do in the next decade to be a great place to work.”

Julie Sweet, Chair & CEO, Accenture

Below is just a snapshot of our recent efforts toward improving our own sense of belonging and connection.

- In 2021, we collected over 900,000 pieces of feedback from employees.
- We found key learnings against a number of omni-connected levers, including modern leadership, thriving culture and agile organization.
- We've seen passion, inspiration and drive soar, enabling us to build on that momentum. And we also get early warning signs when people are experiencing distress and anxiety, so we can work to address them proactively.
- The results have guided us to heighten efforts around team mental health, belonging and time protection, as well as recognizing and rewarding leaders for the shared success they create across our [360° Value framework](#).

- Results are viewed in aggregate, as well as at local and business unit levels, so actions can be tailored, swift and impactful.

All of this was achieved against the backdrop of implementing a new growth model in nine months during the pandemic. In FY21 we went on to deliver record performance, with significant market share gains and strong profitability. And we promoted a historic 120,000 people last year and welcomed 100,000 more to our Accenture family.¹⁵



Make the (omni) connection

From always connected to omni-connected: Creating omni-connected experiences to strengthen culture, deepen trust and drive results.

Omni-connected employee experiences meet leaders' goals for growth, speed and sustainability—and employees' needs for flexibility, equity and meaning. To do so, they must be envisioned and executed with trust at heart and value at the core. Companies that embrace this opportunity strengthen culture strategically, unlock people's potential and move their organizations forward, by design.

Most CEOs would agree that the past two years can be defined as an equal mix of unpredictability and tough decisions. Working toward omni-connected experiences, however, is the opposite. It results in lasting, positive outcomes for people and the business alike. That, of course, makes it one of the best investments a leader can make.

“Introducing a more agile and connected style of leadership was key to becoming more centered on customers, creating cultural change, and turning our business around. We kept things simple, turned managers into agile leaders, and got colleagues on board with new ways of working. The difference is incredible.”

Mike Hancox, CEO, Yodel



About the research

We took a multi-method approach using four proprietary research initiatives.

1. Survey

Accenture Research conducted a survey of 5,000 workers across skill levels, as well as 1,100 C-level executives. Both surveys were conducted in 12 countries: Australia, Brazil, Canada, China, France, Germany, India, Japan, Singapore, Sweden, the United Kingdom, and the United States. Respondents came from 10 industries: Banking, Insurance & Capital Markets; Communications & Media; Consumer Goods & Services; Energy (Oil and Gas); Health; Life Sciences; Public Sector; Retail; High Tech; and Utilities. The survey was conducted between July and August 2021.

How we measured omni-connection:

Step 1: We assessed the strength of connection employees have to their organization, team and work.

Step 2: We completed a factor analysis to ensure unique but related constructs.

Step 3: We enforced reliability measures of a Cronbach alpha of .7 or higher.

2. Interviews and multiple case studies

We triangulated our findings from the large-scale primary data (survey and in-depth interviews with 15 C-level executives). We also collected more than 50 case studies through secondary research and interviews, focusing on initiatives that organizations are undertaking to enable omni-connected experiences.



3. Economic value modeling

We combined CXO survey insights on organizational culture with econometric modeling to estimate:

- **Impact on a company's financial results;**
- **Effect on workers' Net Better Off scores through improved omni-connectedness;**
- **Reduction in "hustle culture" behaviors.**

We did this in two steps:

First, we used the CXOs survey results to estimate:

- Omni-connectedness score consisting of three dimensions: connectedness to the organization, to the team and to work (average of three dimensions);

- Hustle score, created from an average of four items that describe the culture of a highly competitive organizational mindset, with employees working beyond what is expected of them during a normal working day;
- Net Better Off score: physical, emotional, relational, purposeful, employable and financial well-being (average of six dimensions);
- Relationship between organizational culture characteristics like omni-connectedness and level of hustle, and companies' Net Better Off score (regression analysis).

Then, we examined the relationship between Net Better Off and revenue growth from earlier research and academic papers to estimate the effects on financial performance.

4. Data science analysis on earnings calls

To better understand the focus on issues related to organizational culture and changes in work during disruptions, we collected and analyzed earnings call transcripts.

First, we created groups of words categorized by relevant Talent and Organization topics. Then we collected ~40,000 transcripts of ~8,700 global companies for the period of January 2020 to April 2022 that mention the topics of interest. We filtered all relevant keywords and counted their mentions by company over time to estimate frequency, intensity and variety of relevant topics.

We then explored the specifics of omni-connected companies. Using the CXO survey we could assess companies by their omni-connectedness.

Finally, we selected the top 50 companies with the highest omni-connectedness and filtered out earnings calls results for them. Then we performed the same statistical analysis on this sample.

For details please see: [Care to Do Better \(Accenture, 2020\)](#).

Green, Huang, Wen, and Zhou, "Crowdsourced Employer Reviews and Stock Returns" (2018), Journal of Financial Economics.

To produce revenue growth estimates, we sourced S&P Capital IQ financial data of ~3,000 global companies respecting size, industry and country features of the CXO survey.

References

- ¹ Accenture Research analysis on Workers and CXO survey 2019, CXO survey 2021, Capital IQ and Green, Huang, Wen, and Zhou, "Crowdsourced Employer Reviews and Stock Returns" (2018), Journal of Financial Economics
- ² A 2021 study by the University of Chicago and the Mexico Autonomous Institute of Technology. Retrieved from: <https://www.chicagobooth.edu/review/are-we-really-more-productive-working-home>
- ³ Duke Fuqua School of Business article. "Leadership isn't about you - It's about everybody else, CEO says." Retrieved from: <https://www.fuqua.duke.edu/duke-fuqua-insights/distinguished-speakers-series-beth-ford-leadership-isn%E2%80%99t-about-you-it%E2%80%99s-about>
- ⁴ Accenture data science analysis of earnings call transcripts of ~8,700 global companies for the period of January 2020 to April 2022.
- ⁵ Accenture CxO Pulse, June/July 2021, n=3200.
- ⁶ MIT Sloan article. "Are your team members lonely?" Retrieved from: <https://sloanreview.mit.edu/article/are-your-team-members-lonely/>
- ⁷ Fortune article. "[What it takes to be considered a great employer during the Great Resignation](https://fortune.com/2022/04/26/great-employer-great-resignation-ceo-daily/)". Retrieved from: <https://fortune.com/2022/04/26/great-employer-great-resignation-ceo-daily/>
- ⁸ % of CEOs who strongly agree/agree who believe these traits are being considered more important than before Accenture. CXO Pulse Survey. July, 2020. N=100.
- ⁹ Cisco. Retrieved from: <https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2021/m02/it-s-time-to-get-selfish-and-put-your-people-first.html>
- ¹⁰ Fortune article. "What it takes to be considered a great employer during the Great Resignation". Retrieved from: <https://fortune.com/2022/04/26/great-employer-great-resignation-ceo-daily/>
- ¹¹ Atlassian. Retrieved from: <https://www.forbes.com/sites/petercohan/2021/05/05/culture-of-innovation-drives-atlassians-38-growth/?sh=5c4624d56de5>
- ¹² Emergence, The Rise of Deskless Workers, 2018. Retrieved from: desklessworkforce2018.com
- ¹³ American Express. Retrieved from: <https://about.americanexpress.com/all-news/news-details/2021/American-Express-Introducing-Amex-Flex--Our-New-Way-Of-Working/default.aspx>
- ¹⁴ Walmart. Retrieved from: <https://www.shrm.org/resourcesandtools/hrtopics/technology/pages/walmart-new-app-future-of-hr-tech.aspx>
- ¹⁵ Accenture Annual Report 2021. Retrieved from: https://www.accenture.com/_acnmedia/PDF-165/Accenture-Fiscal-2021-Annual-Report.pdf

Authors



Ellyn Shook

Chief Leadership & Human Resources Officer, Accenture



Christie Smith

Lead - Talent & Organization/
Human Potential

Thank you

Marketing Content Lead: Courtney Bonanno

Research Lead: Mamta Kapur

Research Team: Gabriela Burlacu, Svenja Falk, Francis Hintermann, Carrie Kleiner, David Light, Sankara Narayanan, Ranjan Ramdas, Tchicaya Robertson, Reggie Romain, Abira Sathiyathan, Pragati Sharma, Nataliya Sysenko, Christine Yiannakis

The authors of the report would like to thank the following executives, practitioners and partners for their valuable contributions:

Alex Aizenberg, Marc Appel, Eric Arnold, Marjorie Arnold, Knar Bedian, Chalmer Canizares, Justin Chatigny, Stephen Connors, Marty Cowman, Mark Emerson, Emer Finnegan, Niamh Foran, Karen Harte, Andy James, Kadence, Joanne Kaufman, Ruth Keane, Sinead Kennedy, Noelani Kimura, Jill Kramer, Harish Kumar, Sandra Najem, Paddy Lynch, Kathy Mancini, Eddie Matz, John McDermott, Aoife McEvoy, McGuire Research, Andreea-Lucia Macsiniuc, Winston Mendoza, Maxi González Narváez, Heather Niebel, Dylan O'Brien, Beatsy Pearl Orit, Jane O'Hara, Isaiah Papellero, Heather Parker, Jenny Redohl, Ivens Ribeiro Silva, Laura Stef-Praun, Katy Rosati, Julie Roth, Emilio Sarubbi, Karen Saverino, Sheryl Sober, Heather Spring, Marcos Testa, Ash Tutt, Paige Walker, Ashley Williams, Brian Yamada

About Accenture

Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialized skills across more than 40 industries, we offer Strategy and Consulting, Song, Technology and Operations services—all powered by the world's largest network of Advanced Technology and Intelligent Operations centers. Our 699,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities.

Visit us at www.accenture.com.

About Accenture Research

Accenture Research creates thought leadership about the most pressing business issues organizations face. Combining innovative research techniques, such as data science led analysis, with a deep understanding of industry and technology, our team of 300 researchers in 20 countries publish hundreds of reports, articles and points of view every year. Our thought-provoking research developed with world leading organizations helps our clients embrace change, create value, and deliver on the power of technology and human ingenuity.

Disclaimer

This content is provided for general information purposes and is not intended to be used in place of consultation with our professional advisors. Copyright © 2022 Accenture. All rights reserved. Accenture and its logo are registered trademarks of Accenture.