



# The transformation agenda

Acceleration redefined

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January 14<sup>th</sup>, 2021



“

**There is no alternative to digital transformation. Visionary companies will carve out new strategic options for themselves — those that don't adapt, will fail.**

”

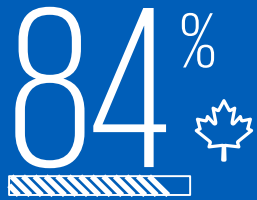
Jeff Bezos, Amazon


# 2020 CEO Outlook Report

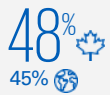
## Growth & digital



POST-COVID-19



confident in growth of their company over the next three years  
67% 



confident in growth of national economy



confident in growth of global economy

### Top risks to growth during COVID-19

- Environmental/climate risk
- Return to territorialism
- Emerging/disruptive technology risk
- Talent risk

POST-COVID-19

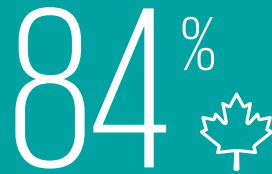


felt they sharply accelerated digitization of operations and creation of next-gen operating models

## Digital workforce



POST-COVID-19



vs.

placing more capital investment in buying new technology

67% 

POST-COVID-19



(down 13% since January)

placing more capital investment in developing workforce's skills and capabilities

33% 

### Talent biggest emerging risk for CEOs in Canada and abroad

PRE-COVID-19

#10 

POST-COVID-19  
TIED FOR

#3 

PRE-COVID-19

#12 

POST-COVID-19

#1 

## Leading with purpose



PRE-COVID-19




said their organizational objective was to embed their purpose into everything they do to create long-term value for stakeholders

POST-COVID-19



felt their corporate purpose gave them a clear framework for making COVID-19 related decisions

77% 

POST-COVID-19



felt they need to re-evaluate their corporate purpose as a result of COVID-19

79% 

PRE-COVID-19



shifted their focus to the social component of ESG

# Top risks to growth noted by CEOs

PRE-COVID-19 🇨🇦
#1 Environmental/climate risk
#2 Cyber security risk
#3 Return to territorialism
#4 Emerging/disruptive technology risk
#5 Operational risk (tied for #5)
#5 Interest rate risk (tied for #5)
#5 Regulatory risk (tied for #5)

PRE-COVID-19 🌐
#1 Environmental/climate risk
#2 Return to territorialism
#3 Cyber security risk
#4 Emerging/disruptive technology risk (tied for #4)
#4 Operational risk (tied for #4)

POST-COVID-19 🇨🇦
#1 Environmental/climate risk (tied for #1)
#1 Return to territorialism (tied for #1)
#3 Emerging/disruptive technology risk (tied for #3)
#3 Talent risk (tied for #3)
#5 Cyber security risk (tied for #5)
#5 Regulatory risk (tied for #5)
#5 Supply chain risk (tied for #5)

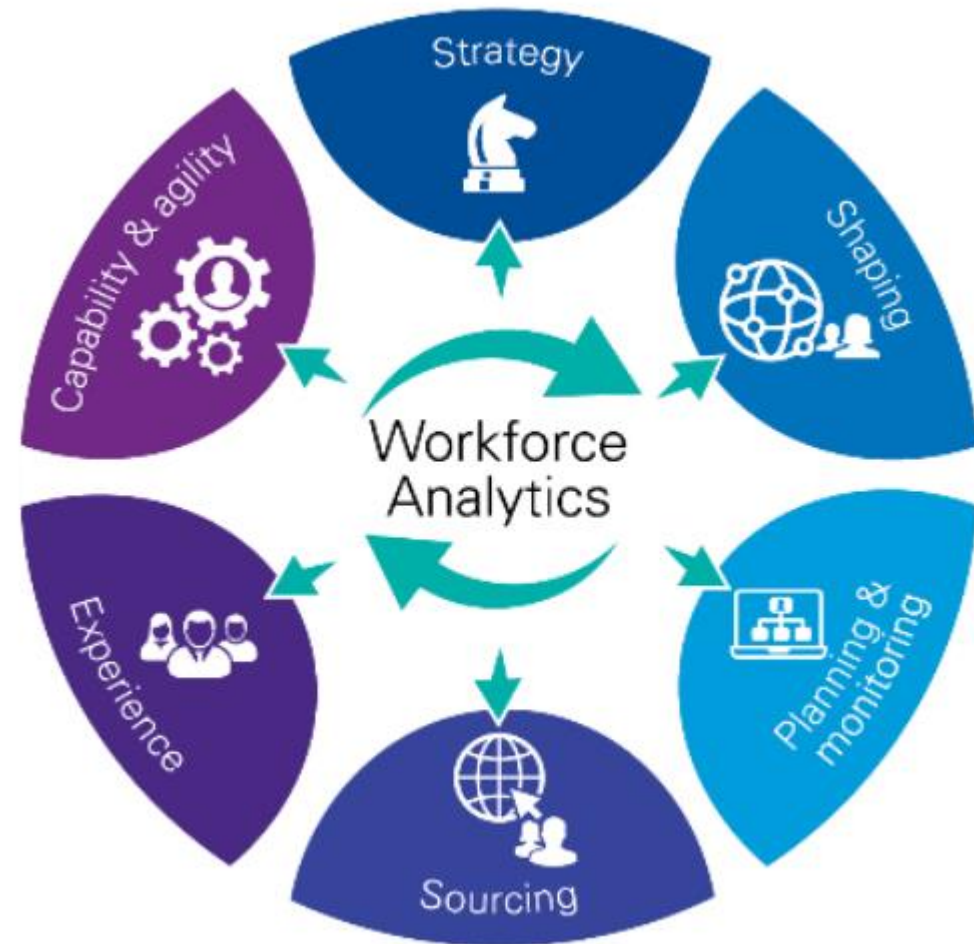
POST-COVID-19 🌐
#1 Talent risk
#2 Environmental/climate risk
#3 Supply chain risk
#4 Return to territorialism
#5 Cyber security risk

**Significant opportunity: the customer**



# The evolving workforce – a holistic approach

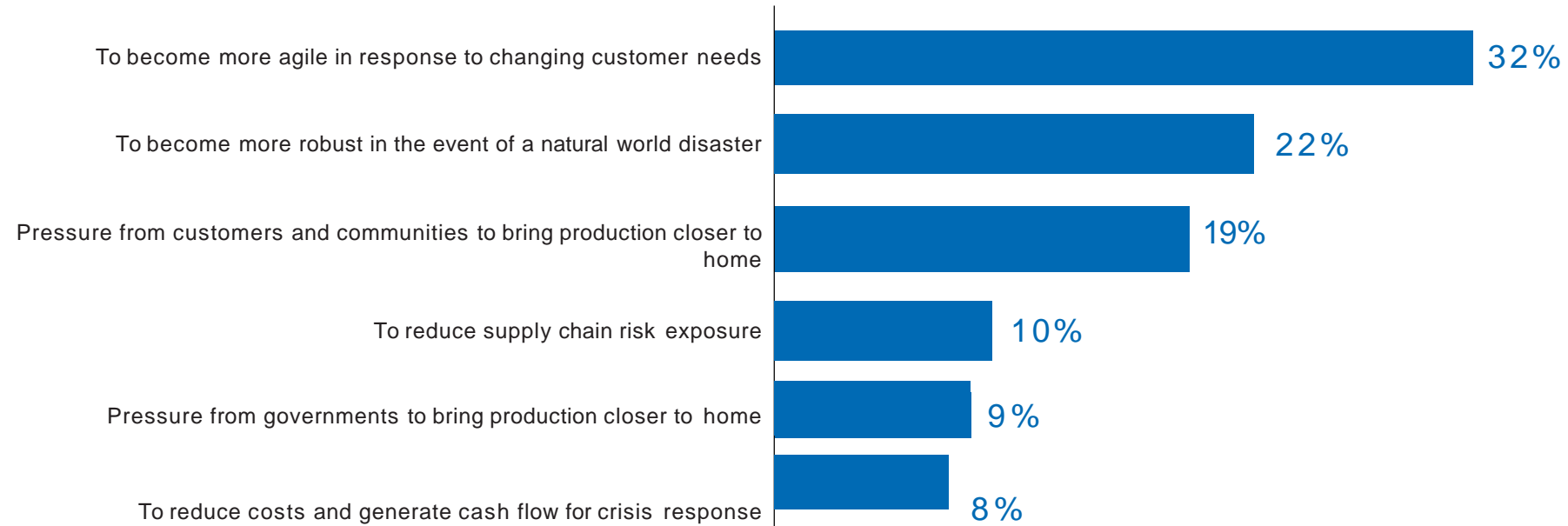
Organizations may not need to transform every aspect of the framework at the same time. But looking at them holistically will aid prioritization, and enhance. Understanding of how each element impacts the rest.





# Customer centric supply chain

## Reasons CEOs are rethinking their supply chains



# The voice of the customer

**Customers are more connected, empowered, and demanding**



**Instant  
access**

Information and options  
at their fingertips



**Accelerated  
innovation**

Demand for new levels of  
speed and advancements



**Channel  
shift**

Move to a mobile  
and video first world



**Democratization  
of communication**

Democratization of brand  
reputation by social networks



**Customer  
power**

Customers creating  
buyer markets



**Renegotiation  
of trust**

Collapse of confidence  
in institutions and need  
for privacy

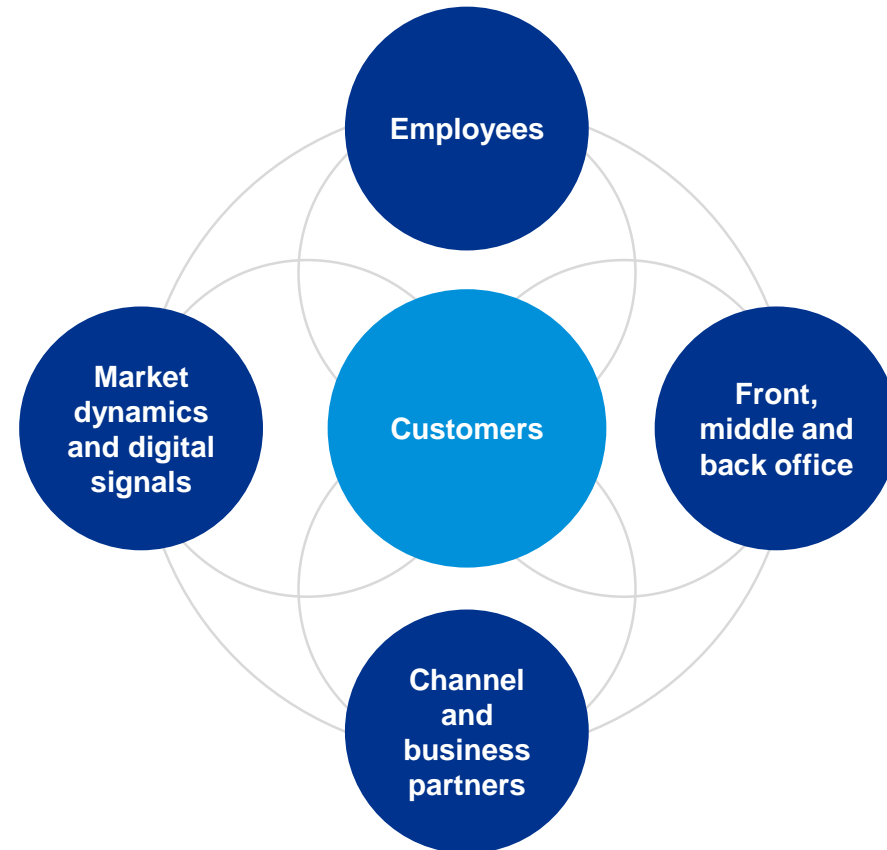


**Death of  
complexity**

Deliver advanced  
products and services  
with simplicity

# Re-aligning to meet the needs of your customer & transform

**As businesses look beyond the immediate impacts of COVID-19, towards recovery and a new reality, it's time to adopt a connected enterprise mindset and accelerate digital transformation.**





“

**We went from being the  
Flintstones to the Jetsons in 9  
months.**

”

Dan Schulman, CEO, Paypal



Alan Peretz

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