

The CEO 20 Pulse on the Future of Work



2018 Benchmark Report

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INTRODUCTION

No organization is immune to the changes in today's work environment.

Smaller, more agile competitors with new business models are disrupting entire industries; advanced technologies are generating new opportunities to create value; automation is rapidly putting large segments of the labor market at risk of redundancy; rising urban centers are shifting new opportunities to emerging markets. These are just a few of the trends changing the way organizations operate around the world, and they are doing so at an increasing speed.

In fact, 73% of business executives we surveyed believe that changes will occur faster, forcing companies to go through restructuring, culture changes, and mergers or acquisitions, at times all at once. These trends will soon—if they haven't already—radically change the work that employees need to do, as well as the employment expectations of those doing the work.

How are companies preparing for these massive changes, and what role will HR have to play? This report will show how executives are currently thinking about and responding to these trends, and illustrate their expectations for the future of work.

EXECUTIVE SUMMARY

Key Insight

1. CEOs and CHROs believe that the trend most disrupting their organization is changing customer expectations.
2. Over half of organizations surveyed are looking to increase the size of their workforce, and around 70% of CEOs and CHROs want to push decision making down the hierarchy.
3. Organizations are facing a 14% workforce automation risk, and only 20% of CEOs believe they have a sufficient strategy to address this.
4. Seventy-four percent of CEOs and 62% of CHROs believe there is a business need or responsibility to invest in retraining employees at risk of redundancy.
5. The vast majority of CHROs expect competition for critical talent to increase over the next 12 months.

Questions You Should Be Asking

How do our business and culture strategies support a more customer-centric organization? Does our organization have the people capabilities it needs to support new ways of creating value?

How is our workforce and the way work is done in our organization changing? How are our leaders held accountable for giving greater autonomy and support to their frontline employees?

What is preventing employees from partially or fully automating their own jobs to more effectively deliver value to the business? What can we do to help employees drive further automation?

Do we need to change the expectations about our responsibilities to employees facing automation risk? How effective are our training programs in building critical skills that are expensive to buy?

What can we do differently to expand the pool of candidates that we're competing for, both outside and within the organization? How competitive is our employment brand?

EXECUTIVE SUMMARY (CONTINUED)

Key Insight

6. Many organizations are experimenting with new ways to expand their candidate pool, from larger internship programs to sharing talent pools with other organizations.
7. CEOs and CHROs believe that heads of HR should prioritize championing the organization's culture above all other responsibilities.
8. Sixty-three percent of CEOs are confident that the operating model of their HR function is effective, compared to just 54% of CHROs.
9. Most CHROs want to radically transform the way HR services are delivered to internal clients, starting with managers.

Questions You Should Be Asking

What internal systems can we create to facilitate cross-functional career mobility? What external relationships are we willing to leverage to ensure we have the talent to compete in the market?

What does success for our CHRO look like in supporting current needs and long-term strategies? What experiences must our CHRO have over the next 12 months to move the business forward?

What must our HR function be able to do for it to be considered a critical creator of business value? What investments does HR need for the function to reach that vision?

How should different parts of the business's experience with HR look for HR to be considered strategic? How can HR focus more on the experiences of its internal customers?

ROADMAP

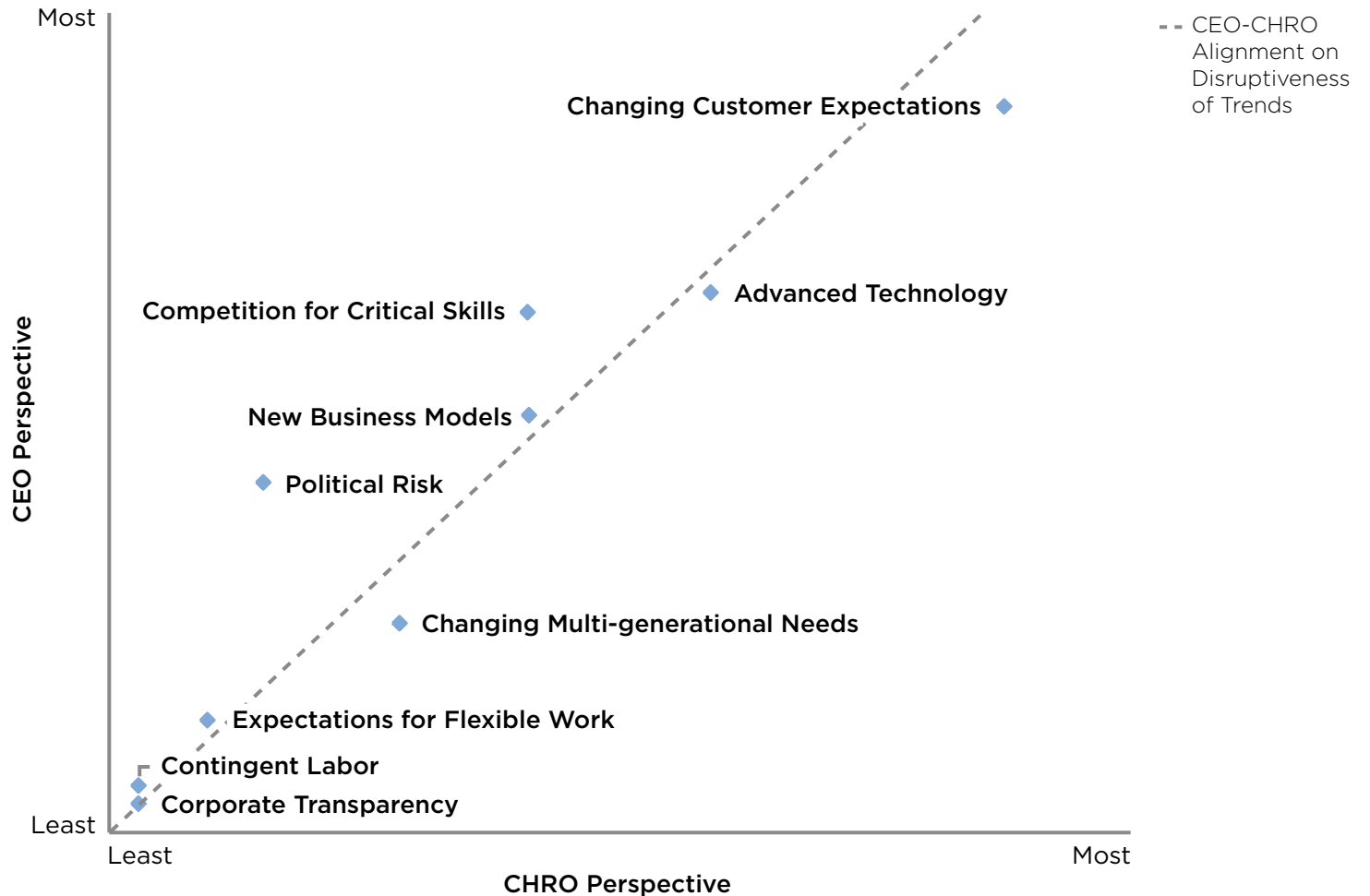


CEOs and CHROs are mostly aligned on the trends affecting their businesses, with customer expectations being the most disruptive.

- However, CEOs are much more worried than CHROs about increasing competition for critical skills as well as political and regulatory risks.
- CEOs and CHROs do not believe that expectations for more flexible work, growing contingent labor dynamics, and increasing corporate transparency (e.g., scrutiny of diversity issues) will significantly disrupt organizations.

CUSTOMER EXPECTATIONS DISRUPTING THE WORLD

Most Disruptive Trends for CEOs and CHROs
Measured by Impact, Velocity, and Organizational Preparedness



n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Data based on a composite score of the importance of each trend, when trends are expected to be felt, and how prepared respondent's organization is in addressing the trend. See [Appendix B](#) for a full description of each trend.

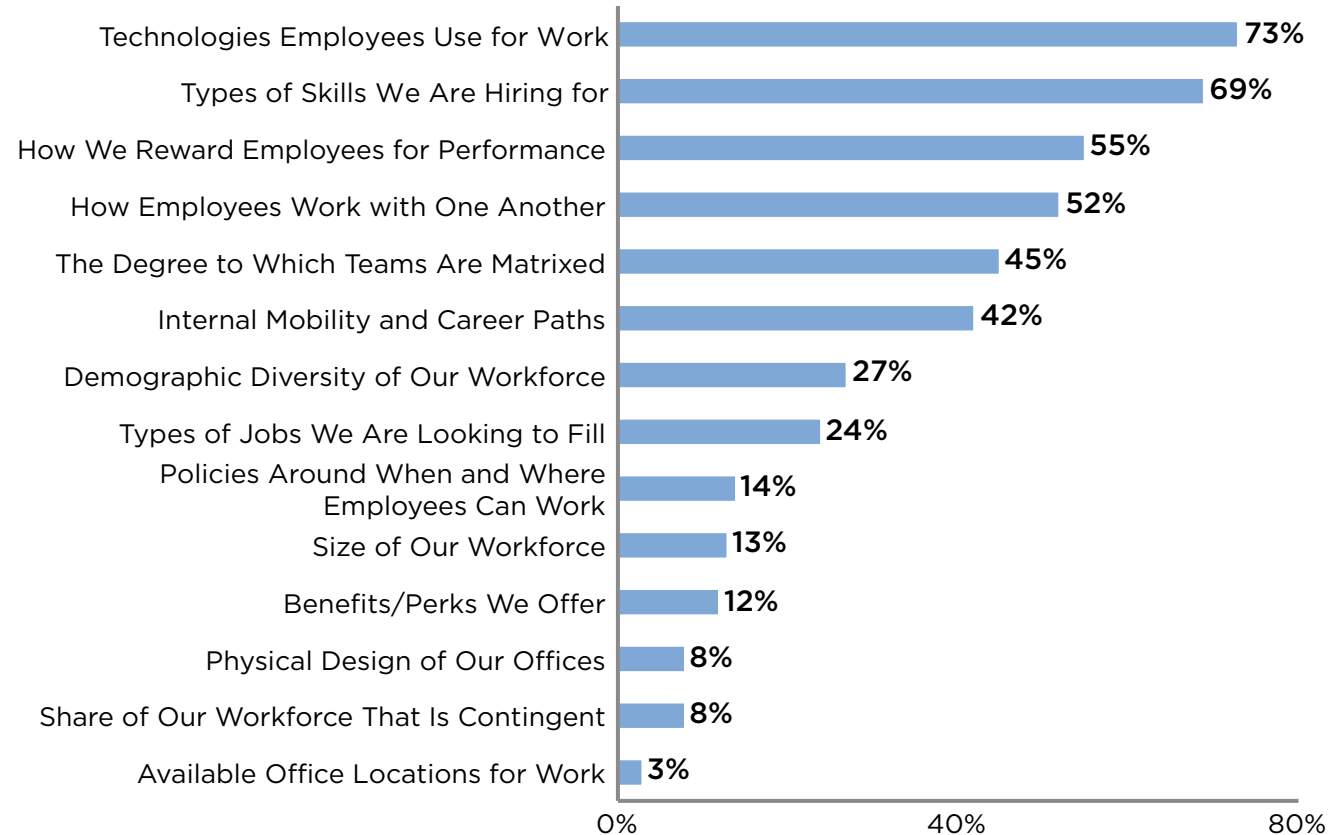
Around 70% of CHROs believe that significantly changing the technologies employees use for work and their workforce skills profile will drive significant growth.

- More than half of CHROs believe that a different approach to rewarding employees for performance can lead to substantial growth—indicating that current rewards practices are suboptimal.
- CHROs also believe this is the case with the way employees currently work with one another.

STILL MANY OPPORTUNITIES TO DRIVE GROWTH

Changes to the Future of Work

Percentage of CHROs Agreeing If Significantly Changed Will Drive Most Growth Over Next Three Years



n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

“Our senior leadership cohort doesn’t understand how fundamentally different the skills of our workforce need to be, and how quickly the enterprise collection of skills needs to change. (These changes are happening now!) Most senior leaders only understand what is familiar to them and can’t adjust accordingly; thus, making the same choices about skills they’ve made for the past several years with only minor tweaks.”

CHRO
Government Agency

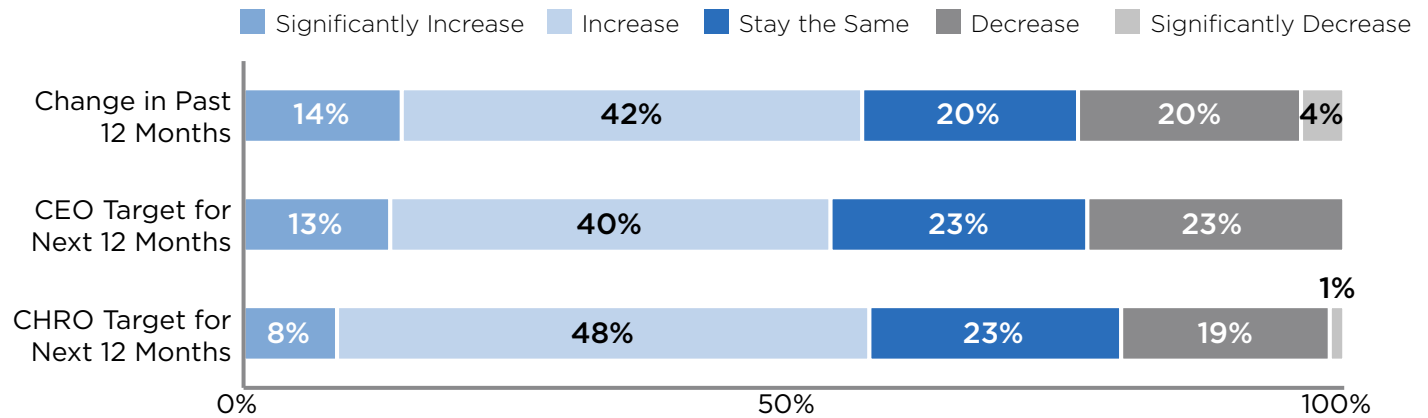
Many organizations plan to increase both the size of their total labor force and its proportion of contingent labor.

- Over 50% of organizations plan to increase the size of their workforce, a similar amount compared to the past 12 months.
- However, over one-third of organizations want to increase their proportion of contingent labor in the next 12 months, more than the number that did so last year.
- In general, CEOs and CHROs agree on the degree to which workforce size and the proportion of contingent labor need to grow.

THE WORKFORCE PROFILE IS CHANGING

Change and Desire to Change Size of Total Labor Force

Percentage Selecting Each Option



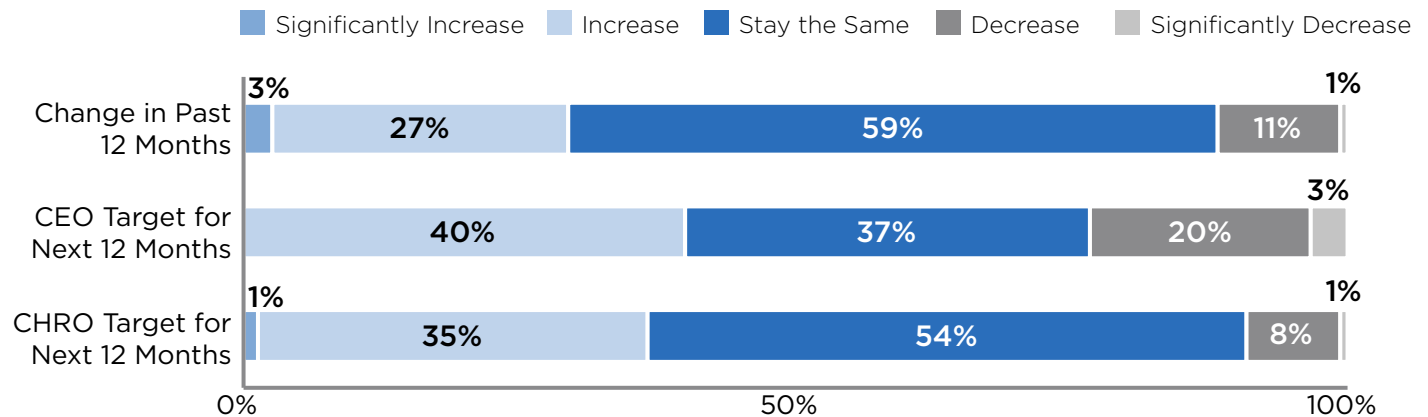
n = 30 CEOs and 153 Chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Totals may not add up to 100% due to rounding.

Change and Desire to Change Proportion of Contingent Labor

Percentage Selecting Each Option



n = 30 CEOs and 153 Chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Totals may not add up to 100% due to rounding.

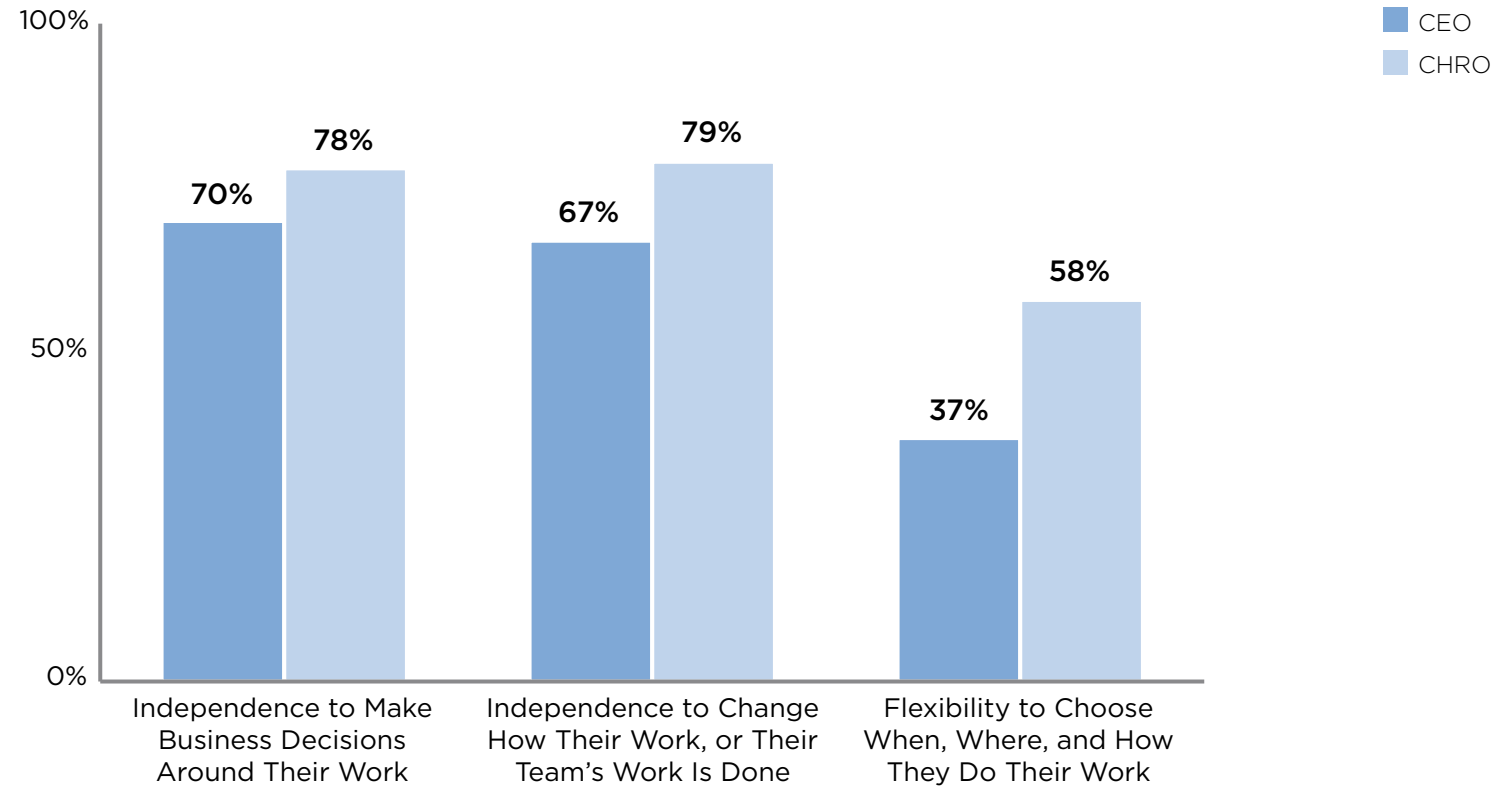
Most CEOs and CHROs want to empower employees by giving them more autonomy to make business decisions and change how work is done.

- Around 60% of CHROs also agree that employees should be given more flexibility to choose when, where, and how they do their work, compared to just 37% of CEOs.

HOW WORK GETS DONE IS ALSO CHANGING

Growing Employee Autonomy

Percentage Agreeing That Employees Should be Given Significantly More of the Following



n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Respondents were asked to select strongly agree, agree, neutral, disagree, or strongly disagree. Data are a sum of the first two responses.

“I’m concerned with the pace of change and our senior executives’ ability to keep up with the change—acknowledging that they don’t have all of the answers in a world that is very different than what they grew up in and what made them successful—and therefore, being comfortable with leading in a different way and empowering more junior people in the organization to lead and to push us forward.”

CHRO
Food Processing Company

Note: This quote has been edited for brevity and clarity.

ROADMAP



CHROs believe that 14% of the existing jobs across their organization are at risk of automation over the next three years.

- However, just 20% of CEOs and 10% of CHROs say that they have an organizational strategy that sufficiently deals with potential automation risks.
- Only 7% of CEOs and 17% of CHROs believe there is no need for their organization to have a strategy that addresses automation risks.

ORGANIZATIONS UNPREPARED FOR AUTOMATION

Automation Risk in the Organization and HR

Estimates by CHROs

Area of Business	Average	Asia	ANZ	EMEA	NA	SA
Organization	14%	22%	17%	15%	12%	24%
HR Function	14%	24%	20%	12%	11%	21%

n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: For more information, please refer to [Appendix E](#).

Organizational Approaches to Address Automation Risk

Percentage Selecting Each Option



n = 30 CEOs and 153 chief HR officers.

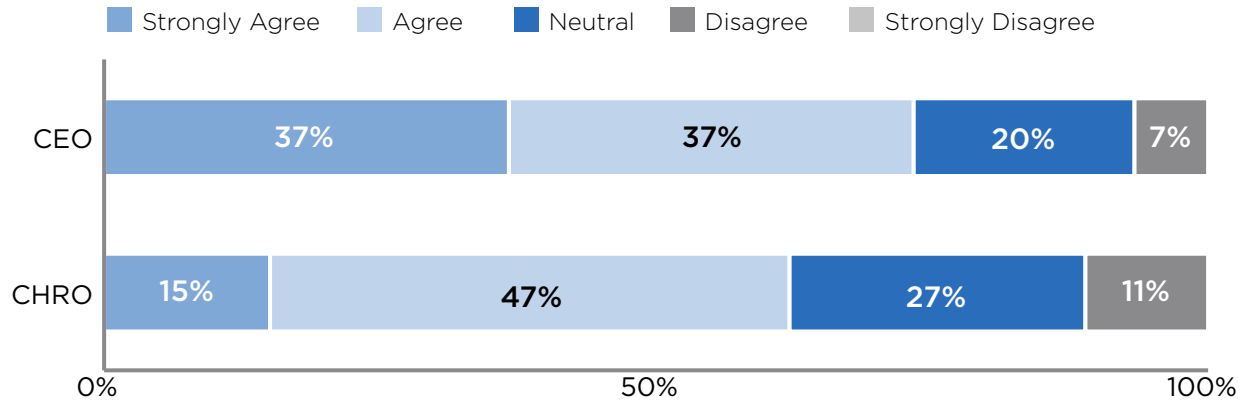
Source: CEB 2017 CEO 20 Pulse on the Future of Work.

Most executives believe there is a need or responsibility for their organization to invest significantly more in retraining employees at risk of redundancy.

- Most CEOs and CHROs believe that their organizations need to invest heavily in training employees and in career mobility across the organization.
- Around 20% of CEOs and CHROs, however, also believe that organizations need to train and prepare employees for opportunities outside the organization.

GREATER INVESTMENT IN RETRAINING NEEDED

Business Need or Responsibility to Invest Significantly More in Retraining
Percentage Selecting Each Option



n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Totals may not add up to 100% due to rounding.

Strategies to Support Employees at Risk of Redundancy

Percentage Agreeing with the Need to Start Doing or Do Significantly More in the Next 12 Months

Strategies to Invest In	CEO	CHRO
Invest in training employees for other opportunities in the organization.	79%	95%
Invest in greater career mobility inside the organization.	73%	68%
Invest in more support for employees to find other opportunities outside the organization.	24%	23%
Invest in training employees for other opportunities outside the organization.	19%	27%
Invest in different-in-kind severance packages.	11%	23%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

ROADMAP

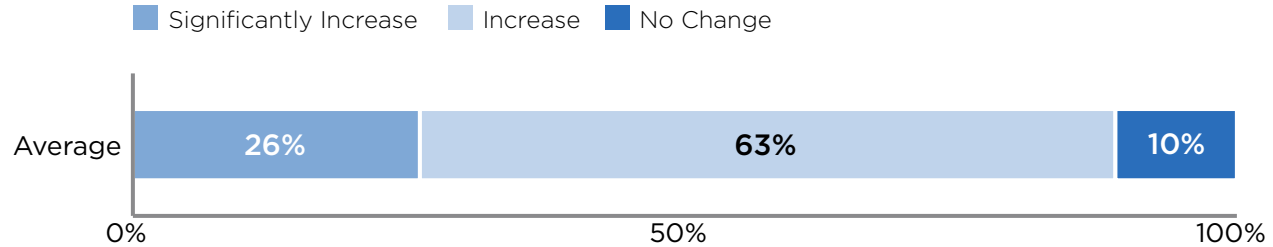


The vast majority of organizations will experience increasing competition for critical talent.

- Over 25% of organizations expect competition to increase significantly.
- In order to expand their supply of critical talent, most organizations are looking to expand their internship and training programs.
- Over 30% of organizations are looking to grow shared talent pools with other businesses, and to remove standard education requirements from their recruiting requirements.

COMPETING IN A NEW WAR FOR TALENT

Change in Competition for Critical Talent Over Next 12 Months
Percentage of CHROs Selecting Each Option



n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Respondents were asked to select significantly increase, increase, no change, decrease, or significantly decrease. No respondents selected the latter two options. Total does not add up to 100% due to rounding.

Strategies to Expand Supply of Critical Talent

Percentage of CHROs Selecting Each Option

Strategies to Invest In	We Will Do More of This	We Will Start Doing This	We Will Not Be Doing This
Expand our internship programs.	64%	15%	22%
Partner with existing training program providers.	60%	18%	23%
Establish new, external training programs.	50%	22%	28%
Expand our contingent workforce.	38%	20%	42%
Expand our apprenticeship programs.	39%	18%	44%
Accept alternative education certification in-lieu of traditional education requirements.	28%	26%	46%
Expand available work locations.	37%	16%	47%
Establish shared talent pools with other organizations.	10%	22%	68%
Remove standard education requirements (e.g., 4-year undergraduate degree).	18%	13%	69%

n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Many organizations are facing an increasingly multigenerational workforce, which also presents many challenges and opportunities.

- The biggest challenge is that an increasingly multigenerational workforce requires new management practices.
 - Several CEOs and CHROs cite the need for leaders to be able to manage changing expectations and approaches to work.
- The greatest opportunity, however, is in the diversity of thought and perspectives this trend brings.

More quotes about the challenges and opportunities of an increasingly multigenerational workforce can be found in [Appendix G](#).

MANAGING INCREASINGLY DIVERSE TALENT

Challenges of a Multigenerational Workforce *Common Themes*

Category of Response	Average
New Management Practices	17%
Engaging Critical Talent	14%
Flexible Work Practices	13%
Diversity Without Inclusion	13%
New Career Management	12%
New Incentive Systems	9%
Conflict of Opinions	8%
Change Management and Resistance	7%
Organizational Alignment	7%

n = 30 CEOs and 153 chief HR officers.
Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Opportunities of a Multigenerational Workforce *Common Themes*

Category of Response	Average
Diversity of Thought	27%
Organizational Learning	24%
Diversity of Capabilities	15%
Market Understanding	15%
Business Improvement	8%
Force for Internal Change	8%
Talent Management	2%
Work Redesign	2%

n = 30 CEOs and 153 chief HR officers.
Source: CEB 2018 CEO 20 Pulse on the Future of Work.

“One size fits all for compensation, benefits, engagement, etc. doesn’t work. Each generation has their own way of working and we need to be inclusive of all of them.”

CEO
Technology Company

“A significant number of our older workers will be eligible for retirement in the next few years. They will be very difficult to replace in large numbers given the difficulties recruiting and training new workers.”

CEO
Aerospace and Defense Company

“A multigenerational workforce provides diverse background, experience, skills, and perspectives to come up with better customer solutions... [and] there are opportunities for mentoring...and reverse mentoring.”

CEO
Pharmaceutical Company

Note: Quotes have been edited for brevity and clarity.

ROADMAP

Trends Changing the Future

- Changing customer expectations is the trend most disrupting organizations.
- Many organizations are increasing their workforce size and pushing decision making down the hierarchy.

The Threat of Automation

- Organizations are facing a significant automation risk, but few have prepared a strategy to address this.
- Most executives believe there is a business need or responsibility to invest in retraining employees at risk of redundancy.

The New War for Talent

- Organizations expect a significant increase in competition for critical talent.
- Many organizations are experimenting with new ways to expand their candidate pool.

HR in the Future of Work

- CEOs and CHROs agree that heads of HR should focus on leading the function before all else.
- But CEOs are more confident in their HR operating model than CHROs are.
- CHROs want to radically transform how HR services are delivered to internal clients, starting with managers.

CEOs and CHROs are aligned on roles that heads of HR should play to support the business, the first of which is to be the champion of culture.

- This means that heads of HR will need to prioritize working with the CEO to manage the organization's sense of purpose, and to engage the workforce in alignment with business needs.

CULTURE IS THE TOP PRIORITY FOR CHROs

CHRO Roles to Prioritize and Support the Business in 2018

Average Ranking by CEOs and CHROs

Role of the CHRO	CEO	CHRO
Champion of Culture and Purpose Work with the CEO to manage the organization's mission, role in society, and culture that enables all to do their best work.	1	1
Architect of People Strategy Design and execute compelling workforce strategies, and personally serve as an assessor and developer of top talent.	2	2
Organizational Change Leader Guide the organization through transformations at scale, and ensure organizational agility to drive progress.	3	3
Trusted Advisor and Coach Maximize effectiveness of executive leadership by providing data-based guidance on talent risks and opportunities.	4	4
Functional Business Leader Manage HR processes and systems as an effective business, using data-based insights and actions.	5	5

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

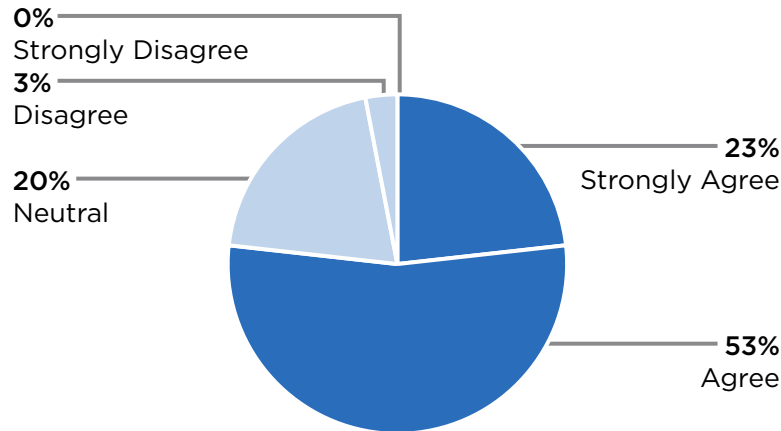
Note: These roles are based on our work with the [CHRO Global Leadership Board](#) to develop a model of the world-class CHRO, validated by several Fortune 500 CEOs.

Over 75% of CEOs believe their organization has a culture that enables performance.

- Most CEOs believe that their organization's culture strongly prepares it to innovate, but over one-quarter of CEOs do not believe their organization has the culture it needs to navigate digital disruptions to how work is done.

CEOs TRUST IN THEIR CULTURE AND ITS ROLE

CEO Confidence That They Have the Culture They Need to Perform
Percentage Selecting Each Option



n = 30 CEOs.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Total does not add up to 100% due to rounding.

Scenarios That Culture Currently Prepares Organizations For

Percentage of Organizations, by Degree of Preparation

Scenarios	Strongly Prepares	Somewhat Prepares	Does Not Prepare
Innovate new products and services to drive business outcomes.	63%	30%	7%
Manage an increasingly geographically dispersed workforce.	43%	53%	3%
Weather a significant corporate crisis (e.g., public relations scandal).	40%	50%	10%
Ensure effective decision making during structural change (e.g., M&A).	33%	53%	13%
Manage employee resistance during workforce change (e.g., downsizing).	33%	47%	20%
Navigate digital disruptions to how work is done (e.g., automation, AI).	33%	40%	27%
Manage an increasingly multigenerational workforce.	27%	67%	7%
Support significant changes to organizational strategy.	27%	67%	7%

n = 30 CEOs.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

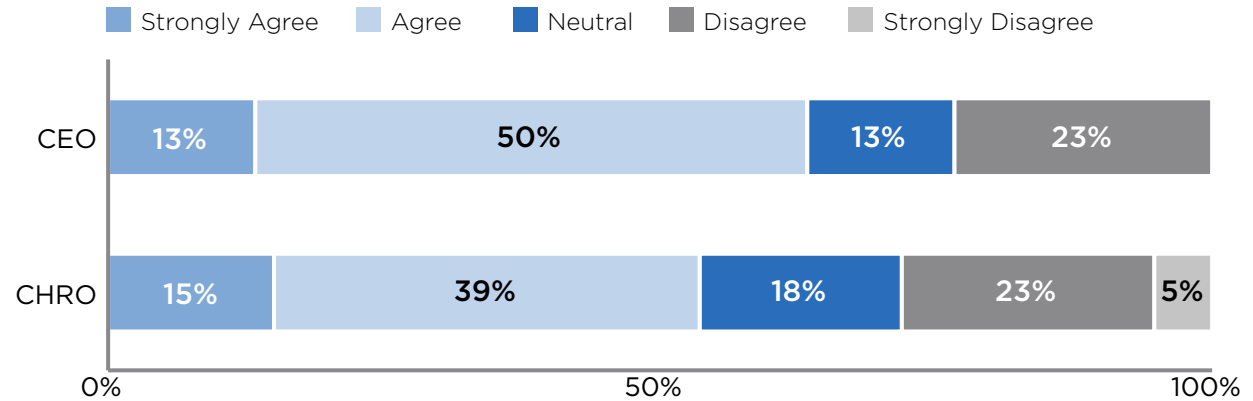
Over 60% of CEOs believe their HR function's current operating model effectively drives business outcomes, compared to just 54% of CHROs.

- Moreover, only 13% of CEOs and 15% of CHROs strongly agree that their HR model is effective.
- Regardless of their HR model, chief HR officers believe they need to radically transform how HR services are delivered to internal customers, starting with managers.

ONLY HALF OF CHROs CONFIDENT OF HR MODEL

Views of Current HR Model's Effectiveness at Driving Business Outcomes

Percentage Selecting Each Option



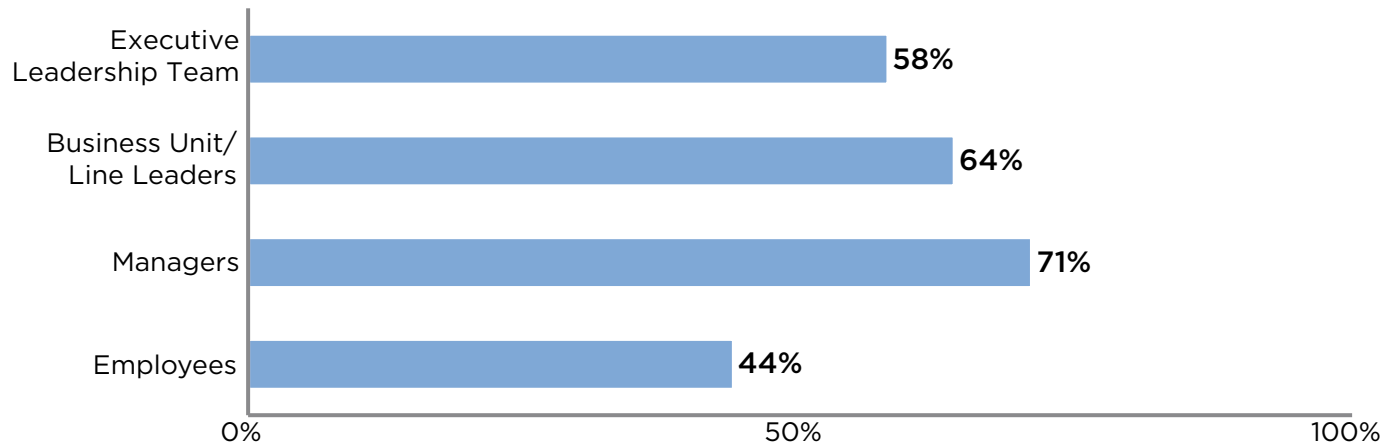
n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Totals may not add up to 100% due to rounding.

Transforming HR Service Delivery

Percentage of CHROs Agreeing with Need to Radically Transform How Stakeholders are Served



n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Respondents were asked to select strongly agree, agree, neutral, disagree, or strongly disagree. Data are a sum of the first two responses.

CEOs and CHROs are mostly aligned on where HR needs to invest to advance the function, with people capabilities taking priority over other areas.

- While only 54% of CHROs agree that their HR operating model effectively drives business outcomes, CEOs and CHROs do not believe investing in structural changes should be prioritized.
- CEOs and CHROs, however, disagree about the impact that relationships and technology have on moving the HR function forward, with CEOs prioritizing the former.
- When it comes to such technology investments, CEOs view productivity and quality metrics as the top two considerations for successful technology implementation.

FOCUS ON PEOPLE TO ADVANCE THE FUNCTION

Investments to Advance the HR Function

Average Rankings by CEOs and CHROs

Areas of HR	CEO	CHRO
People: Attract, train, and engage talent required for the HR function to implement talent strategies.	1	1
Relationships: Invest in cross-functional projects to build relationships and drive impact across the business.	2	4
Processes: Streamline processes through agile methodology and project management.	3	3
Technology: Increase use of digital technologies and analytics for talent management activities.	4	2
Structure: Redesign the operating model of the HR function (e.g., separate operational and strategic activities) .	5	5

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Success Metrics CEOs Consider for HR Technology Investments

Average Rankings

Metrics	Average
Productivity (e.g., percent change in unwanted turnover)	1
Quality (e.g., employee feedback)	2
Net Present Value or Internal Rate of Return	3
Sales (e.g., number of complete service requests)	4
Speed (e.g., percent reduction in process cycles)	5
Operations (e.g., number of processes automated)	6

n = 30 CEOs.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

When it comes to helping the business through digital transformation, CEOs and CHROs do not agree on CHRO priorities.

- CEOs believe the most important priority for CHROs in supporting digital transformation is to focus on attracting, developing, and retaining digital talent, whereas CHROs believe that helping shift the mind-set of business leaders is more important.
- Nevertheless, in general, CEOs have a range of suggestions for CHROs to help drive business outcomes, from supporting leaders in change to developing HR strategies that will embrace the future of work.

MISALIGNMENT ON CHRO DIGITAL PRIORITIES

How CHROs Should Support Digital Transformation

Percentage Selecting Each Option

Digital Priorities	CEO	CHRO
Attract, develop, and retain digital talent to support our digital strategy.	23%	16%
Help leaders shift their mind-sets on the talent implications of their digital strategy.	20%	23%
Help facilitate or train the workforce to adapt to digital changes.	20%	7%
Transform the HR function to become more technologically advanced and data driven.	13%	18%
Help our CEO/board of directors develop a digital strategy by identifying the implications of future workforce trends.	10%	20%
Improve the employee experience through digital workplace and productivity tools.	10%	6%
Other	0%	2%
Our organization is not/will not be going through a digital transformation.	3%	7%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Responses were limited to one option. Totals do not add up to 100% due to rounding.

CEO Advice to CHROs to Advance the Business

Select Quotes

“Create a modern HR function that is a business partner and is right sized to win, with a world-class HR and data products for our businesses.”

CEO
Financial Services
Company

“Help our leaders seek constructive change, overcome silo mentalities, and pay closer attention to customer journeys and needs.”

CEO
Construction
Company

“The fourth industrial revolution will impact every sphere of our business—how work will be done, what our workforce and culture will look like, etc. Heads of HR need to clearly understand these impacts and develop an HR strategy and business model that embraces this future.”

CEO
Mining Company

Additional Insights

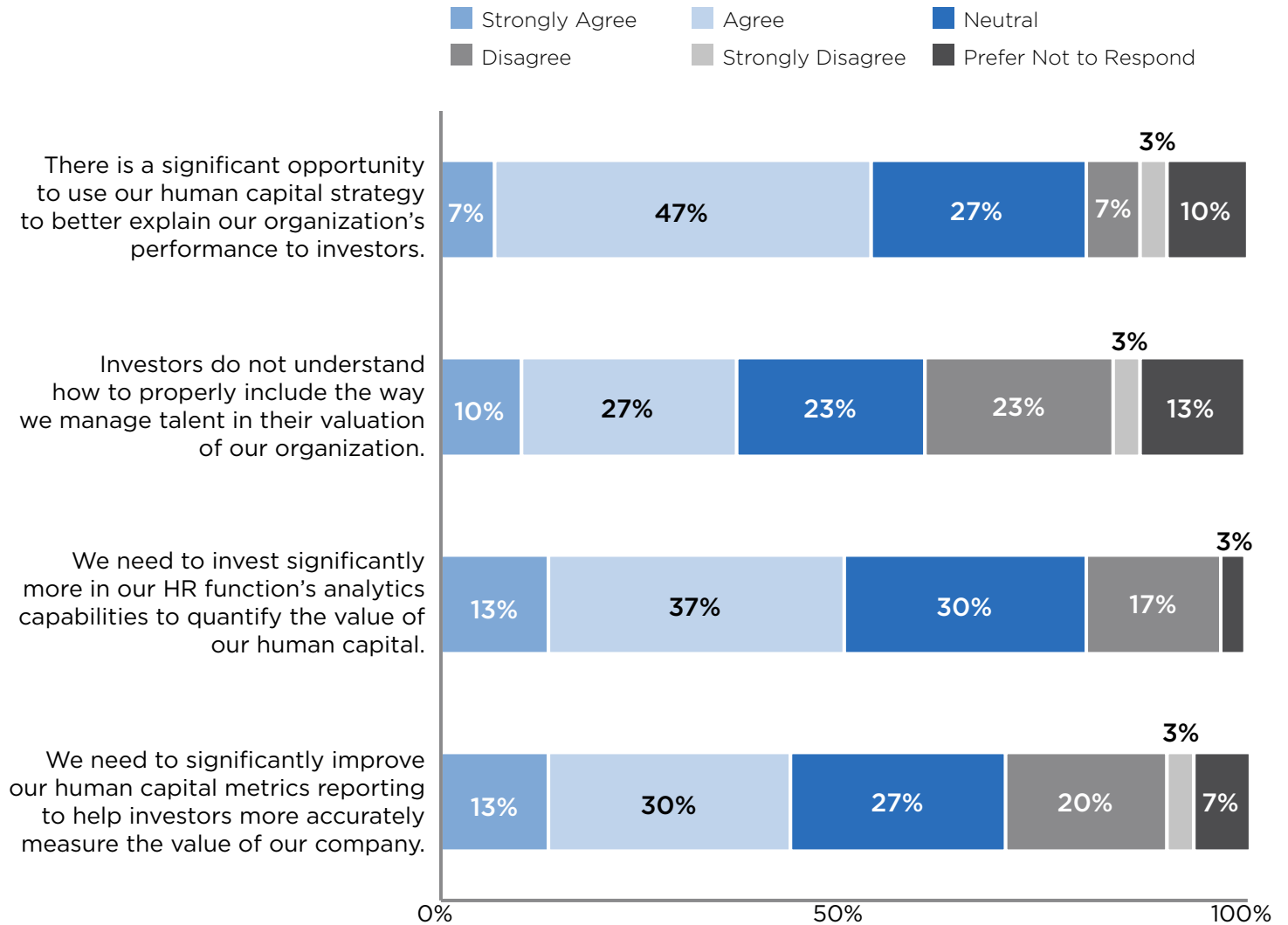
Over half of CEOs believe there is a significant opportunity to use their human capital strategy to better explain performance to investors.

- CEOs are split as to whether investors understand how to properly include human capital in their valuation models.
- However, at least 50% of CEOs believe in investing significantly in HR analytics to quantify the value of their organizations' human capital, and 43% of CEOs agree that human capital metrics reporting for investors needs to be significantly improved.

MANY CEOs WANT TO QUANTIFY HUMAN CAPITAL

The Changing Role of Human Capital in Investor Relations

Percentage of CEOs Selecting Each Option



n = 30 CEOs.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: "Investors" were defined as shareholders or other external stakeholders with direct influence over executive decisions.

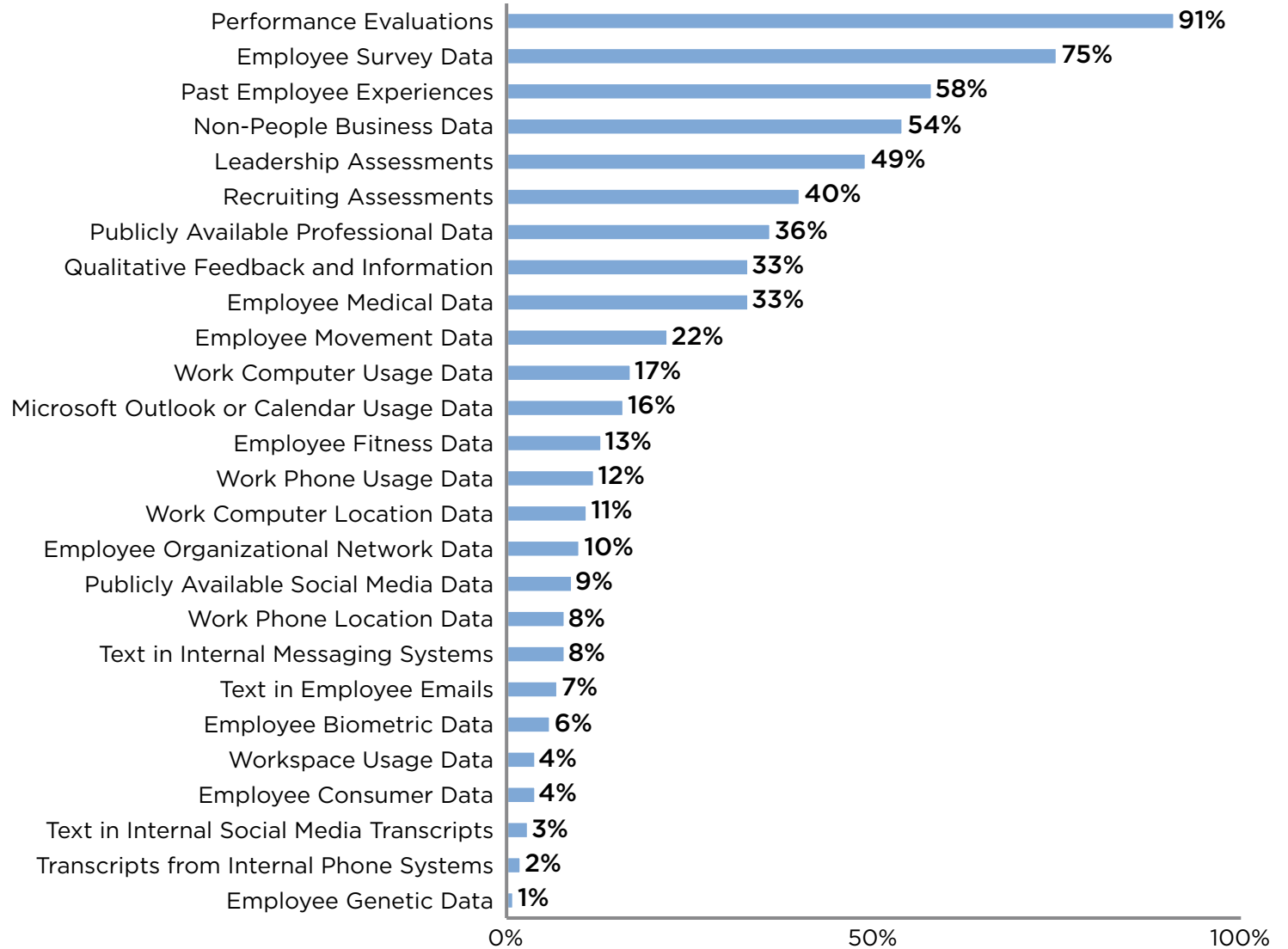
Totals may not add up to 100% due to rounding.

Many organizations are beginning to apply new digital technologies and analytics to improve talent management activities.

- In addition to information gathered from recruiting processes and employee surveys, many organizations are exploring new sources of data, ranging from employee fitness to workspace usage data.

EXPLORING NEW SOURCES OF EMPLOYEE DATA

Employee Information Used in Talent Management Activities
Percentage of Organizations Using Each Type



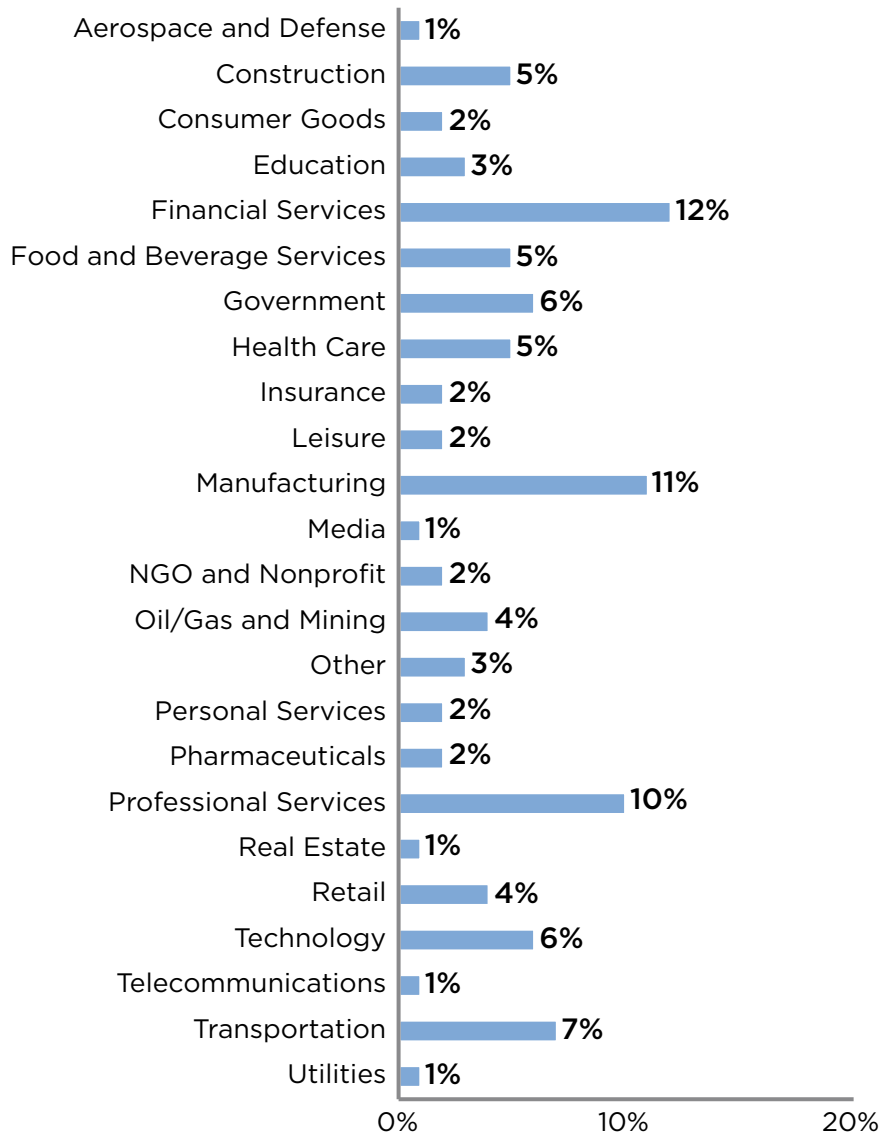
n = 153 chief HR officers and 86 talent analytics leaders.

Source: CEB 2018 CEO 20 Pulse on the Future of Work; CEB 2018 Future of Talent Analytics Survey.

Appendix

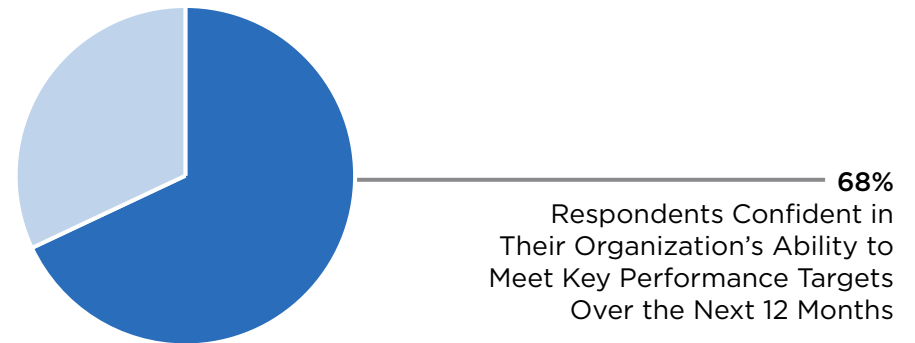
APPENDIX A: DEMOGRAPHICS

Organizations by Industry



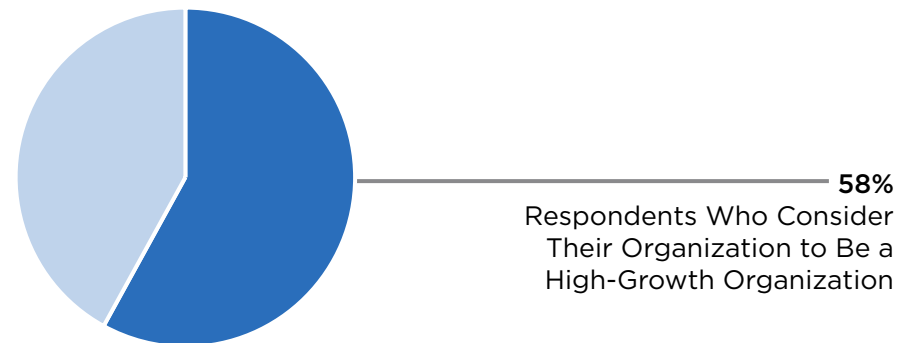
n = 30 CEOs; 153 chief HR officers.
 Source: CEB 2018 CEO 20 Pulse on the Future of Work.
 Note: Total does not equal 100% due to rounding.

Percentage of Confident Organizations



n = 153 chief HR officers.
 Source: CEB 2018 CEO 20 Pulse on the Future of Work.

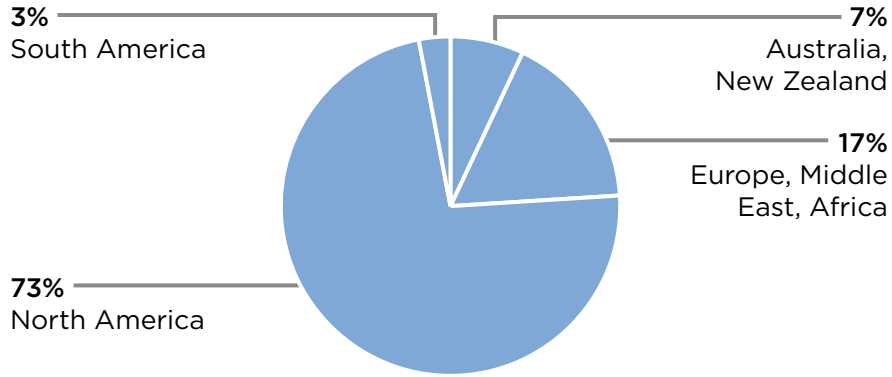
Percentage of High Growth Organizations



n = 153 chief HR officers.
 Source: CEB 2018 CEO 20 Pulse on the Future of Work.

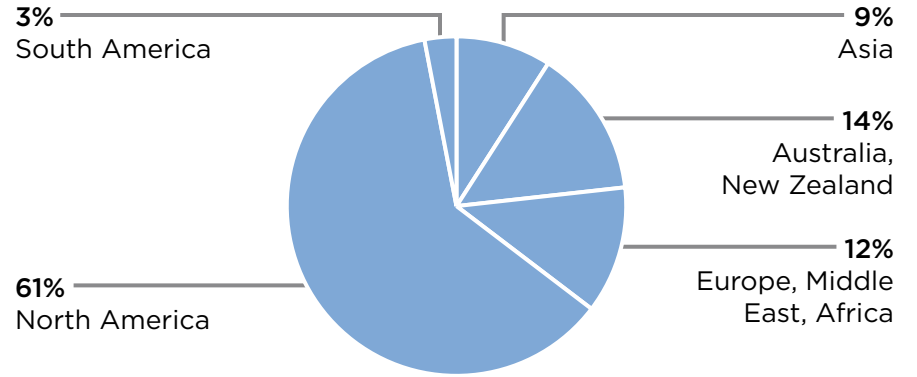
APPENDIX A: DEMOGRAPHICS (CONTINUED)

CEOs by Region



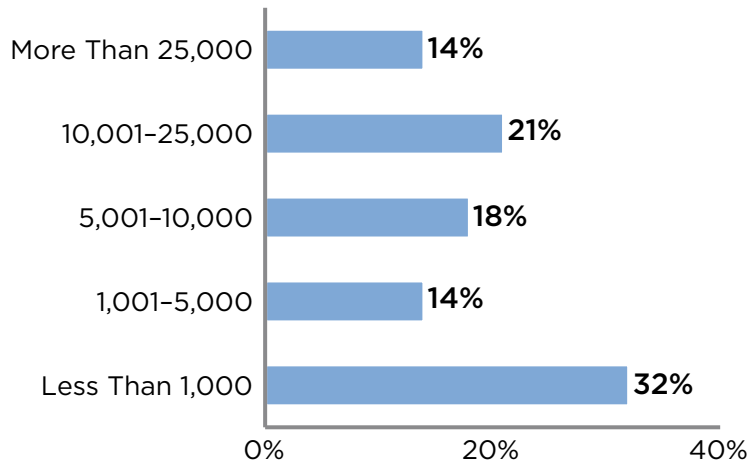
n = 30 CEOs.
Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Heads of HR by Region



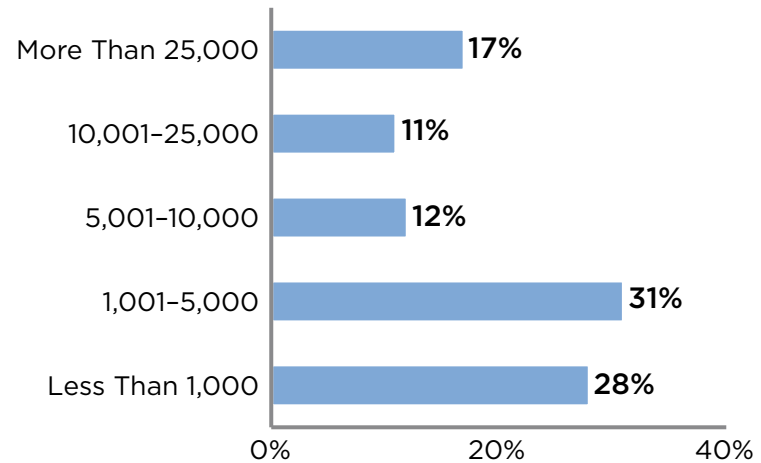
n = 153 chief HR officers.
Source: CEB 2018 CEO 20 Pulse on the Future of Work.
Note: Total does not equal 100% due to rounding.

CEOs by Workforce Size



n = 30 CEOs.
Source: CEB 2018 CEO 20 Pulse on the Future of Work.
Note: Total does not equal 100% due to rounding.

Heads of HR by Workforce Size



n = 153 chief HR officers.
Source: CEB 2018 CEO 20 Pulse on the Future of Work.
Note: Total does not equal 100% due to rounding.

APPENDIX B: CONCERNS WITH THE FUTURE OF WORK

Select Quotes from CEOs

“1. A culture that encourages innovation and entrepreneurial thinking. Embrace the millennials as a powering source of new creative ideas.

2. Reskill our workforce for new jobs that may not yet exist.

3. Reskill our workforce that could be displaced by new technologies for new opportunities inside and external to the organization.”

CEO
Mining Company

“Our environment is changing faster than ever, and this continues to accelerate—Competition, channels, and consumer expectations are all changing quickly. We are an organization set up to manage a steady business with little change, and we need to bridge the gap to our reality. This means finding and executing our core business more efficiently so we have more time to pursue new business opportunities and adapt to our changing environment.”

CEO
Food Processing Company

“The competition for digital-savvy employees is only increasing, especially in the areas of software programming and data sciences. How can our country get ahead of the curve and produce more qualified candidates through the education system?”

CEO
Technology Company

“How to maintain team function and productivity given the high proportion of telework; I fear we may have gone too far.”

CEO
Health Care Company

“The pace of change is accelerating. How do we train and develop our employees to successfully manage this continuous change? We need to focus on agility and resilience in all our development programs.”

CEO
Pharmaceutical Company

“I think most of our functional departments are still living in the last decade or even last century (information system, processes, and skill set for some managers). This is becoming a more serious barrier to our business growth.”

CEO
Manufacturing Company

$n = 30$ CEOs.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes have been edited for brevity and clarity.

APPENDIX B: CONCERNS WITH THE FUTURE OF WORK (CONTINUED)

Select Quotes from CHROs

Change Management (23% of Responses)

- “The pace and nature of change is faster than any we’ve experienced in my lifetime. Change is happening in every aspect of our lives and our businesses as well. There’s a great deal I see changing with the future of work preferences for location, time, autonomy, shifting to projects/gigs, etc.—It’s the areas we don’t yet see that concern me given how quickly they can take shape in this environment.”
- “The rate of change is so fast. How do we keep the organization relevant at a local country level to embrace the change within the confines of a global organization, where the local country is in a more advanced, mature marketplace?”
- “How we presently talk about the future of work is anxiety-inducing to a lot of people. We must strike the balance between transparency and candor (x number of jobs will not exist in the future). The reality of the fact is that there are ways for organizations and individuals to prepare for this future. We need to move away from panic and move toward pragmatism.”
- “What concerns me most is 1) developing real organizational adaptability to meet rapidly changing market needs, and 2) ensuring business and HR leaders understand emerging talent needs so we can execute quickly as they arise.”

n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes can be categorized by multiple topics and have been edited for brevity and clarity.

Digital Transformation (17% of Responses)

- “We are so security focused that we are not staying abreast of technological advances that would enable our business strategies.”
- “I’m concerned that we will be too slow to the robotics process automation (RPA) and artificial intelligence ‘party,’ and be unable to fully leverage the efficiency play to reinvest in strategic business partners and COEs to truly advance the strategic aspects of the function.”
- “We are two months away from launching a complete global transformation of the HR function including technology implementation, new organizational design, and an entirely new model for HR. I am confident in what this will deliver to improve our employees’ experience and our HR data analytical capability. My biggest concern is that other functions are not keeping up with the digital needs of the organization and we are, therefore, lagging behind our competitors and creating inordinate ‘busy work’ for our people. Our technology is outdated and slow, which doesn’t put us in a strong position to compete and continues to make us resource heavy and expensive.”

APPENDIX B: CONCERNS WITH THE FUTURE OF WORK (CONTINUED)

Select Quotes from CHROs

Leadership Capabilities (15% of Responses)

- “We need to educate and enroll the next level of business leaders to understand the changing needs of the workforce. Unfortunately, they often do not have the people, management, or leadership experience to understand the people aspect of their organization.”
- “Our senior leadership cohort doesn’t understand how fundamentally different the skills of our workforce need to be, and how quickly the enterprise collection of skills needs to change. (These changes are happening now!) Most senior leaders only understand what is familiar to them and therefore can’t adjust their thinking accordingly; thus, they make the same choices about skills they’ve made for the past several years with only minor tweaking.”
- “Concerned that we don’t have a leadership agreement on what our competencies and practices are for leaders, and that we don’t have established expectations of leadership as a performance factor in our rewards system for leaders. There is no objective goal for leaders to help coach our employees for further development and to build commitment and engagement to each other, to our clients, and to our partners.”

n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes can be categorized by multiple topics and have been edited for brevity and clarity.

HR-Business Alignment (13% of Responses)

- “I find there is a sense amongst HR to be overprotective of employees instead of enabling them. This stops HR from focusing on more strategic work (e.g., HR spends too much time babying employees rather than challenging them to grow).”
- “HR workforce skills and mind-set. I am finding it very hard to identify technology-savvy HR staff that we can afford. Very few know or have experience with the HR business partner model and most just want to stay as “order takers” working in isolation, without trying to understand the business. There is a lack of drive and initiative, lack of understanding of how change happens, and lack of strategic and leadership skills.”
- “I think many CEOs and COOs have old perceptions about what HR should and should not deliver which makes it challenging to elevate and prepare the HR function into the twenty-second century.”
- “We need to transfer the leadership of the employees to their managers. We’re still in the mind-set that HR owns the people.”

APPENDIX B: CONCERNS WITH THE FUTURE OF WORK (CONTINUED)

Select Quotes from CHROs

Employee Engagement (11% of Responses)

- “Attracting and retaining talent in a geographical area that is not diverse is a challenge (more in retention than attraction for us). The work we do is so unique and specialized that the kind of people who do it are already limited. Then when we find that skill set in someone who is a diversity candidate, there are few here who look like them to help them acclimate.”
- “I am extremely concerned with millennials. I don’t see them as a very disciplined and hard-working group. They want to get there but are unwilling to make the trip.”

Workforce Planning (10% of Responses)

- “We need to ensure that our workforce is positioned to become the ‘workforce of the future.’ We must identify the necessary skills, competencies, and capabilities to succeed. Then we must assess levels of future needs existing in the current workforce, and close the gaps via retraining, redeploying, or buying new talent.”
- “We must make sure the organization has the right talent at the right time to deliver to the changing needs of our customers.”

n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes can be categorized by multiple topics and have been edited for brevity and clarity.

Recruiting Critical Talent (9% of Responses)

- “Ensure that we are able to attract and, perhaps more importantly, retain the next generation of employees. Our organization and industry are very relationship driven; turnover and extended position vacancies are not only internally disruptive, they also significantly negatively impact the client experience.”
- “Our organization is a service business and as a result, the skilled workforce that we need to service our customers is becoming more difficult to find as a result of the demand for these skill sets. This problem began 20–30 years ago and now that the baby boomers are retiring, the younger generations are not entering manufacturing at the same pace as those retiring.”

Market Environment (8% of Responses)

- “I worry that our key regulators will not be sufficiently prepared for, or will not allow us to make some of the changes that the future of work will require. As a heavily regulated industry, we are often second-guessed and fall behind the learning curve.”
- “That organizations are not reacting quickly enough to the changes in society, politics, regulations, etc., that will have a dramatic impact on how businesses organize, create value, remain competitive.”

APPENDIX B: CONCERNS WITH THE FUTURE OF WORK (CONTINUED)

Select Quotes from CHROs

Organizational Culture (7% of Responses)

- “We are in the midst of transitioning from a family-owned business to being purchased by a private equity firm, with the goal of an IPO in about five years. We’ve been incredibly successful to date. However, what got us here is not going to be what gets us where we need to be in five years. Cultural transformation is critical.”
- “Understanding the real impact of the future of work, and developing appropriate responses whilst not losing focus on the customer and our own people. Culture still eats strategy for breakfast regardless of the era we live in.”

Learning and Development (5% of Responses)

- “As we move closer to automated workplaces, digital technology, and business informatics, we need to know how to strategically apply the critically important ‘human factors’ and people that can make this all work to our customers’ benefit and support the bottom line.”
- “The expectations of a workforce that believes we as an employer are responsible for keeping them relevant through skill building, training, career advancement, and other corporate support, versus these being a shared responsibility.”

n = 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes can be categorized by multiple topics and have been edited for brevity and clarity.

Employment Brand (3% of Responses)

- “I believe that the gig/portfolio labor market is here and we do not have a strategy to attract, engage, contract, motivate, and drive performance through collaboration between this type of diverse and mobile talent. Instead, we rely on past corporate brand and traditional workplace models to hope for the best.”
- “I believe the millennial generation’s craving for short-cycle feedback and recognition will cause an acceleration in job hopping. This will continue to put great pressure on HR organizations to improve their employee value proposition—And this will be expensive and challenging to deliver acceptable ROIs. The long-term effect of this is pretty damaging to large companies with strong cultures built on a boomer set of expectations (loyalty, longer-term pay for performance, linear career paths, etc.).”

Corporate Social Responsibility (1% of Responses)

- “I am most concerned about the need to strategically consider the role employers need to play in ensuring an inclusive society with an economy that delivers environmental and social goals. This will ensure we are attractive in the long term to investors, employees, and our customers.”

APPENDIX C: TRENDS DISRUPTING THE WORLD

Rank Order of Trends by Region

Disruptive Trend	CEOs	Asia	Australia, New Zealand	Europe, Middle East, and Africa	North America	South America
Changing Customer Expectations	1	3	1	1	1	1
Advanced Technology	2	1	2	5	3	6
New Business Models	3	2	5	2	4	2
Competition for Critical Skills	4	5	3	4	2	4
Changing Multigenerational Needs	5	4	8	6	6	5
Political Risk	6	6	6	3	5	3
Expectations for Flexible Work	7	8	4	7	7	7
Contingent Labor	8	8	9	8	8	7
Corporate Transparency	8	7	7	8	9	7

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Score based on a composite of importance of each trend, when trends are expected to be felt, and how prepared respondent's organization is to address the trend.

Description of Trends

Disruptive Trend	Description in Survey Question
Changing Customer Expectations	Changing customer expectations and behaviors
Advanced Technology	Advances in workplace technology (e.g., artificial intelligence, automation)
New Business Models	Emergence of new and competing business models
Competition for Critical Skills	Increasing competition for critical skills, both new and emerging
Changing Multigenerational Needs	New needs and expectations of the multigenerational workforce (e.g., aging workforce, millennials)
Political Risk	Growing regulatory and political uncertainty
Expectations for Flexible Work	Greater flexibility in when and where employees work (e.g., flex hours, remote work)
Contingent Labor	Increasing prevalence of on-demand workers/contingent labor (e.g., gig economy)
Corporate Transparency	Greater transparency into corporate practices (e.g., investor scrutiny of executive pay, diversity)

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

APPENDIX C: TRENDS DISRUPTING THE WORLD (CONTINUED)

Rank Order of Trends Disrupting the Future of Work, by Industry

Disruptive Trend	CEOs	Construction	Consumer Goods	Distribution, Delivery, and Storage	Financial Services	Government	Health Care	Insurance
Changing Customer Expectations	1	1	1	1	1	6	1	1
Advanced Technology	2	3	3	2	3	5	5	2
New Business Models	3	5	2	3	5	7	3	6
Competition for Critical Skills	4	2	5	4	4	1	4	4
Changing Multigenerational Needs	5	4	4	5	6	3	6	5
Political Risk	6	8	6	6	2	2	2	3
Expectations for Flexible Work	7	6	8	8	8	4	8	7
Contingent Labor	8	8	7	7	9	9	9	9
Corporate Transparency	8	7	8	8	7	8	7	8

Disruptive Trend	CEOs	Manufacturing	Oil/ Gas, and Mining	Professional Services	Retail	Technology	Utilities	Other
Changing Customer Expectations	1	1	1	3	1	2	3	1
Advanced Technology	2	2	2	2	3	3	6	2
New Business Models	3	3	7	5	2	4	2	3
Competition for Critical Skills	4	5	3	1	4	1	1	4
Changing Multigenerational Needs	5	4	5	7	7	6	5	7
Political Risk	6	6	6	6	6	5	4	6
Expectations for Flexible Work	7	7	4	7	5	9	7	5
Contingent Labor	8	9	8	4	8	8	7	8
Corporate Transparency	8	8	8	7	9	7	7	8

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Data for the following industries were not included due to insufficient sample size: aerospace and defense, education, food and beverage services, leisure and hospitality, media and entertainment, non-governmental organization and nonprofit, personal services, pharmaceutical, real estate, telecommunications, transportation, wholesale.

APPENDIX D: CHANGES IN THE WORKFORCE

Increase or Significant Increase in Total Workforce Size, by Region and Workforce Size

Change in Total Workforce	Asia	Australia, New Zealand	Europe, Middle East, and North Africa	North America	South America
Past 12 Months	79%	23%	33%	66%	40%
Target for Next 12 Months	79%	33%	22%	67%	17%

Change in Total Workforce	>25,000	10,001-25,000	5,001-10,000	1,001-5,000	< 1,000
Past 12 Months	28%	56%	65%	49%	71%
Target for Next 12 Months	38%	50%	55%	59%	66%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Increase or Significant Increase in Total Workforce Size, by Industry

Change in Total Workforce	Construction	Consumer Goods	Distribution, Delivery, and Storage	Financial Services	Government	Health Care	Insurance
Past 12 Months	56%	40%	44%	56%	44%	73%	59%
Target for Next 12 Months	67%	40%	67%	48%	56%	53%	53%

Change in Total Workforce	Manufacturing	Oil/Gas and Mining	Professional Services	Retail	Technology	Utilities	Other
Past 12 Months	68%	30%	71%	57%	50%	25%	58%
Target for Next 12 Months	72%	40%	86%	43%	65%	38%	50%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Data for the following industries were not included due to insufficient sample size: aerospace and defense, education, food and beverage services, leisure and hospitality, media and entertainment, non-governmental organization and nonprofit, personal services, pharmaceutical, real estate, telecommunications, transportation, wholesale.

APPENDIX D: CHANGES IN THE WORKFORCE (CONTINUED)

Increase or Significant Increase in Proportion of Contingent Labor, by Region and Workforce Size

Change in Proportion of Contingent Labor	Asia	Australia, New Zealand	Europe, Middle East, and North Africa	North America	South America
Past 12 Months	14%	50%	33%	26%	40%
Target for Next 12 Months	29%	46%	35%	36%	50%

Change in Proportion of Contingent Labor	>25,000	10,001–25,000	5,001–10,000	1,001–5,000	< 1,000
Past 12 Months	32%	13%	35%	29%	29%
Target for Next 12 Months	45%	41%	32%	33%	36%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Increase or Significant Increase in Proportion in Contingent Labor, by Industry

Change in Proportion of Contingent Labor	Construction	Consumer Goods	Distribution, Delivery, and Storage	Financial Services	Government	Health Care	Insurance
Past 12 Months	44%	33%	33%	33%	11%	20%	41%
Target for Next 12 Months	56%	20%	67%	33%	33%	20%	41%

Change in Proportion of Contingent Labor	Manufacturing	Oil/Gas and Mining	Professional Services	Retail	Technology	Utilities	Other
Past 12 Months	28%	40%	43%	71%	31%	50%	33%
Target for Next 12 Months	36%	40%	71%	86%	58%	38%	17%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Data for the following industries were not included due to insufficient sample size: aerospace and defense, education, food and beverage services, leisure and hospitality, media and entertainment, non-governmental organization and nonprofit, personal services, pharmaceutical, real estate, telecommunications, transportation, wholesale.

APPENDIX E: AUTOMATION RISK IN THE BUSINESS AND HR

Automation Risk, by Region and Workforce Size

Automation Risk	Asia	Australia, New Zealand	Europe, Middle East, and North Africa	North America	South America
In the Organization	22%	17%	15%	12%	24%
In the HR Function	24%	20%	12%	11%	21%

Automation Risk	>25,000	10,001-25,000	5,001-10,000	1,001-5,000	< 1,000
Past 12 Months	18%	18%	14%	14%	12%
Target for Next 12 Months	21%	15%	15%	12%	11%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Automation Risk in Organizations and Their HR Function, by Industry

Automation Risk	Construction	Consumer Goods	Distribution, Delivery, and Storage	Financial Services	Government	Health Care	Insurance
In the Organization	16%	22%	18%	18%	13%	14%	24%
In the HR Function	26%	25%	18%	16%	12%	12%	20%

Automation Risk	Manufacturing	Oil/Gas and Mining	Professional Services	Retail	Technology	Utilities	Other
In the Organization	19%	18%	11%	22%	14%	24%	11%
In the HR Function	18%	19%	6%	19%	14%	24%	7%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Data for the following industries were not included due to insufficient sample size: aerospace and defense, education, food and beverage services, leisure and hospitality, media and entertainment, non-governmental organization and nonprofit, personal services, pharmaceutical, real estate, telecommunications, transportation, wholesale.

APPENDIX F: COMPETITION FOR CRITICAL TALENT

Change in Competition Over Next 12 Months, by Region and Workforce Size

Change in Competition for Critical Talent	Asia	Australia, New Zealand	Europe, Middle East, and North Africa	North America	South America
Significantly Increase	36%	9%	17%	30%	40%
Increase	50%	77%	83%	60%	40%

Change in Competition for Critical Talent	>25,000	10,001-25,000	5,001-10,000	1,001-5,000	< 1,000
Significantly Increase	32%	25%	35%	22%	20%
Increase	56%	69%	59%	64%	71%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Respondents were asked to select significantly increase, increase, stay the same, decrease, or significantly decrease. No respondents selected the latter two options.

Change in Competition Over Next 12 Months, by Industry

Change in Competition for Critical Talent	Construction	Consumer Goods	Distribution, Delivery, and Storage	Financial Services	Government	Health Care	Insurance
Significantly Increase	11%	13%	11%	33%	44%	20%	24%
Increase	78%	80%	89%	56%	56%	67%	65%

Change in Competition for Critical Talent	Manufacturing	Oil/Gas and Mining	Professional Services	Retail	Technology	Utilities	Other
Significantly Increase	24%	10%	29%	14%	50%	13%	17%
Increase	72%	70%	71%	71%	46%	75%	83%

n = 30 CEOs and 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Respondents were asked to select significantly increase, increase, stay the same, decrease, or significantly decrease. No respondents selected the latter two options.

Data for the following industries were not included due to insufficient sample size: aerospace and defense, education, food and beverage services, leisure and hospitality, media and entertainment, non-governmental organization and nonprofit, personal services, pharmaceutical, real estate, telecommunications, transportation, wholesale.

APPENDIX G: A MULTIGENERATIONAL CHANGE

Select Quotes on the Opportunities of a Multigenerational Workforce, by Topic

Diversity of Thought (27% of Responses)

- “There is a wealth of wisdom and experience from our baby boomers and Gen Xers that the millennials and Gen Z can tap, and they in turn provide fresh perspectives that fuel innovation in the organization.”
- “With a diverse workforce, we are able to leverage the experience of the most senior employees, their determination, and patience balanced by the innovative and creative mind-set of the younger employees. It’s a good balance.”

Organizational Learning (24% of Responses)

- “Helps to preserve the unique culture and ‘institutional knowledge’ of great organizations. This could lead to mutually beneficial skill development, e.g., through mentoring and reverse mentoring.”
- “Different perspectives and experience being thrown at the same problem. The tension created between ‘naïve’ (inexperienced) optimism and ‘seasoned’ (experienced) pragmatism leads to dynamic results, if harnessed constructively.”

Diversity of Capabilities (15% of Responses)

- “Scope of experience. You can have a team made up of people that have experienced companies at all changes of growth, and at different time periods (recession or growth markets). That is experience that can help everyone.”
- “Provides a blend of tried-and-true experience with fresh eyes looking to streamline and simplify the way in which work gets done.”

Market Understanding (15% of Responses)

- “A multigenerational workforce reflects the multigenerational consumers we are marketing and selling to. This should give us an advantage to keep us current on all of the different expectations of our consumers.”

Force for Internal Change (8% of Responses)

- “A forced mechanism for change management. It will be impossible at some point not to consider new ideas and ways of doing business or meeting employee needs.”

Business Improvement (8% of Responses)

- “New ideas, new product development, increased flexibility and innovation.”

n = 30 CEOs; 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes can be categorized by multiple topics and have been edited for brevity and clarity.

APPENDIX G: A MULTIGENERATIONAL CHANGE (CONTINUED)

Select Quotes on the Challenges of a Multigenerational Workforce, by Topic

New Management Practices (17% of Responses)

- “Line managers being able to successfully manage the greater complexity that comes with a more diverse team, especially those who are risk averse.”
- “Developing our leaders to be able to adapt their leadership styles to the people they manage given style, behaviors, and work culture of each one.”

Engaging Critical Skills (14% of Responses)

- “How to harmonize work styles among the different generations, including teamwork, reporting lines, and views on performance.”
- “The older generation tends to stay and are loyal to the company; this is opposite with younger generations. Keeping talent and succession management are both present and future challenges.”

Diversity Without Inclusion (13% of Responses)

- “Assumptions. Individuals using unconscious bias and making assumptions about why someone performs or acts the way they do.”
- “The friction that can occur between generations or the perception that more senior generations are blocking younger generations from moving up in the organization.”

Flexible Work Practices (13% of Responses)

- “Different expectations from ‘work,’ and providing challenges for younger generations to keep them interested and motivated.”

Market Understanding (15% of Responses)

- “A multigenerational workforce reflects the multigenerational consumers we are marketing and selling to. This should give us an advantage to keep us current on all of the different expectations of our consumers.”

New Career Management (12% of Responses)

- “The generations have different expectations around how success is achieved. Prior generations’ success was more closely tied to a time horizon because there were sufficient resources ‘ahead’ of them that were able to do the work. Gen Xers will not have sufficient size to backfill the boomers as they retire. Millennials and technology will need to fill that capability gap. Accelerating the advancement of the Y generation and/or increasing reliance on technology will cause disruption with boomers and Gen X. It is not how they experienced advancement.”

New Incentive Systems (9% of Responses)

- “Different generations expect different things from their employment experience, yet our programs are designed to be more ‘one size fits all.’ We risk ‘one size fits none’ if we don’t adapt our programs, processes, and policies.”

n = 30 CEOs; 153 chief HR officers.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes can be categorized by multiple topics and have been edited for brevity and clarity.

APPENDIX H: HOW CHROS CAN BETTER SUPPORT CEOs

Select Quotes from CEOs

“I would like HR to understand our business better so they can better understand and anticipate our talent needs. We need to understand how automation can help us reduce manual work and create more sustainable, less complicated processes.”

CEO
Pharmaceutical Company

“Help our leaders to encourage their teams to seek and embrace constructive change, overcome silo mentalities, pay closer attention to customer journeys and needs, and identify how to more effectively and productively satisfy customers.”

CEO
Construction Company

“Bring a higher level of business accountability to the entire HR organization, as well as a greater level of agility in how they navigate the various tensions in building a more sophisticated and ‘out front’ talent strategy.”

CEO
Hospitality Company

“Create a modern HR function that is a business partner and is right sized to win. Build world-class data HR products for our businesses, and advocate for cultural changes and design.”

CEO
Technology Company

“The fourth industrial revolution will impact every sphere of our business—how work will be done, what our workforce and culture will look like, etc. My head of HR needs to clearly understand these impacts and develop an HR strategy and business model that embraces this future.”

CEO
Mining Company

“Ensure that I take appropriate and timely action on the senior leadership team to make it a high-performing team that drives our organization to achieve its strategic objectives.”

CEO
Manufacturing Company

“Help me guide the org structure (and restructure) and culture to accomplish our business objectives—growth on our platforms, new channel opportunities, and improve go-to-market excellence.”

CEO
Food Processing Company

$n = 30$ CEOs.

Source: CEB 2018 CEO 20 Pulse on the Future of Work.

Note: Quotes have been edited for brevity and clarity.