

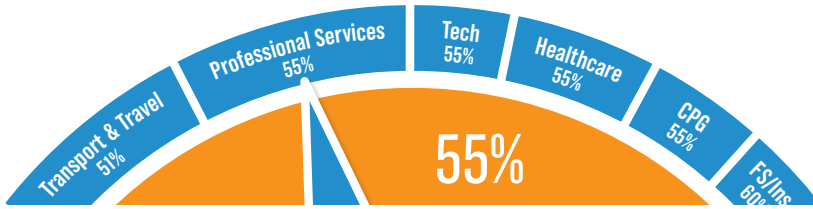
# DIGITAL PULSE— BUSINESS AND PROFESSIONAL SERVICES

*“CEOs should think hard about their role in an industry naive about the impact of digital.”*

Relative to other industries, Business and Professional Services (B&PS) executives don't see as much disruption coming to their organization as the likes of Financial Services and Insurance, Retail or Telecommunications, with around 55% saying their business would be moderately or massively disrupted by digital in the next 12 months. Above all other industries, the CEO rules digital, setting the strategy in 46% of companies, the highest percentage in our survey. But CEOs should think carefully about whether they are the right person for the job. When asked what the biggest barriers to effective digital business are, 85% of respondents cited CEO Not Recognizing the Potential of Digital. Moving lower down in the organization, only 61% of respondents cited Digital Not Being Seen as Important by Leadership. Aside from above barriers, four of the top five barriers were organizational, with Functional Silos and Organizational Inertia topping the list.

## Digital Disruption Barometer

Business and Professional Services sits roughly in the middle of the disruption barometer, at the same level as Consumer Packaged Goods, Healthcare and Technology.

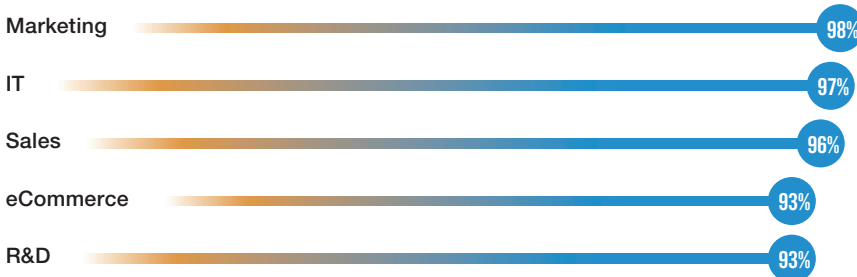


55% of Business and Professional Services executives surveyed responded that their business would be moderately or massively disrupted by digital in the next 12 months.

## Five Functions Most Impacted by Digital

Business and Professional Services executives expect digital to have a sweeping impact across tech-minded and customer-facing functions.

*Percentage of Business and Professional Services Executives: Functions Most Impacted by Digital in the Next 12 Months*



## Five Top Barriers to Effective Digital Business

When asked what the biggest barriers to effective digital business are, Business and Professional Services executives emphasized challenges related to skills, leadership and organizational structure.

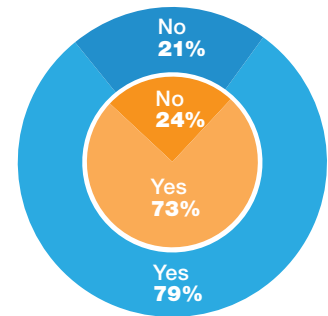
*Percentage of Business and Professional Services Executives Rating Barriers as of High or Moderate Significance*



## Structure and Strategy

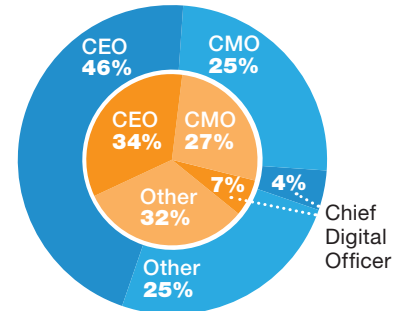
*Does your company have a digital strategy?*

● B&PS  
● Total



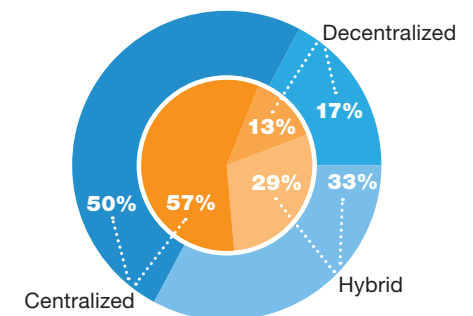
*Who owns digital in your organization?*

● B&PS  
● Total



*How is digital organized in your organization?*

● B&PS  
● Total

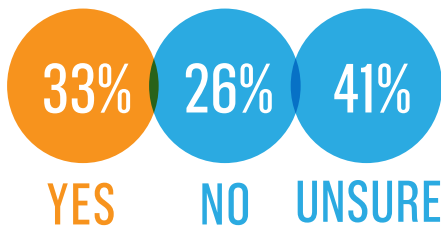


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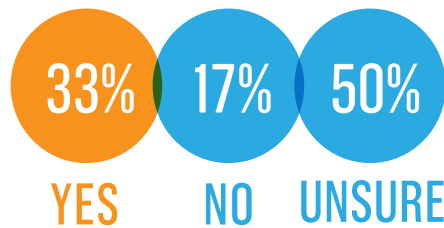
## The People Challenge of Digital

People are the driver of digital in an organization. The below shows how many Business and Professional Services executives agreed and disagreed with two key questions.

*Do you have the right people to define your digital strategy?*



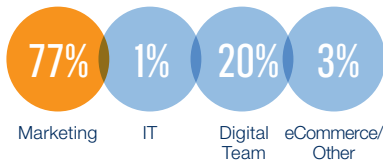
*Do you have the right people to execute your digital strategy?*



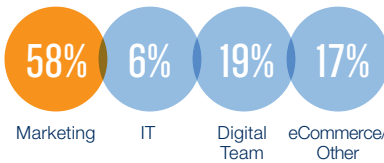
## Ownership of Digital within Organizations

Across organizations, various elements of digital are owned by different parts of the organization. The below shows the percentage of functions that own specific elements of digital in respondent organizations. While Marketing often was cited as an owner, the data demonstrate that little consensus has emerged across Business and Professional Services organizations as digital's logical home(s).

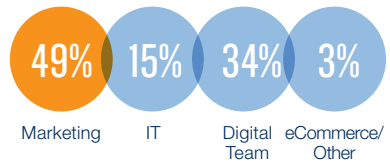
### Social Media Marketing



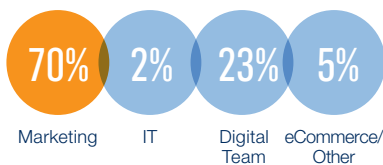
### Customer Mobile App Development



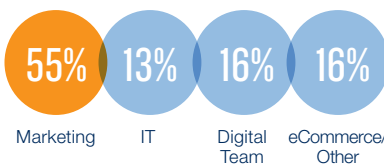
### Customer Experience Strategy



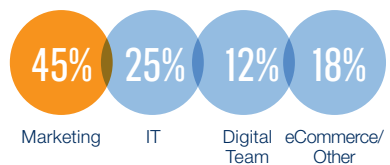
### Digital Media Selection



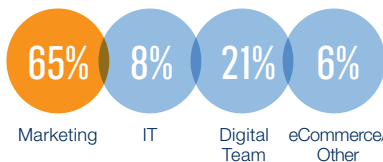
### Vendor Selection



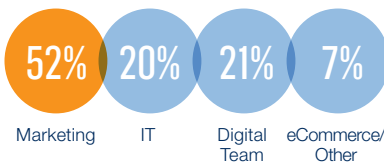
### Employee Digital Engagement



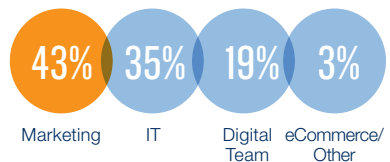
### Social Media CRM



### Web Design

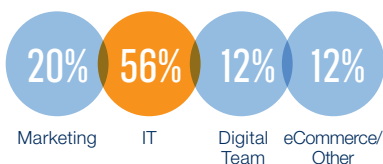


### Customer Analytics

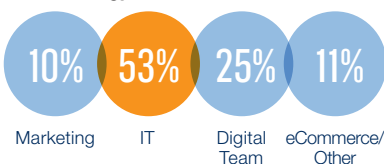


Notable exceptions include **CRM** and **Web Strategy**, which most often are owned by IT.

### CRM



### Web Strategy



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