

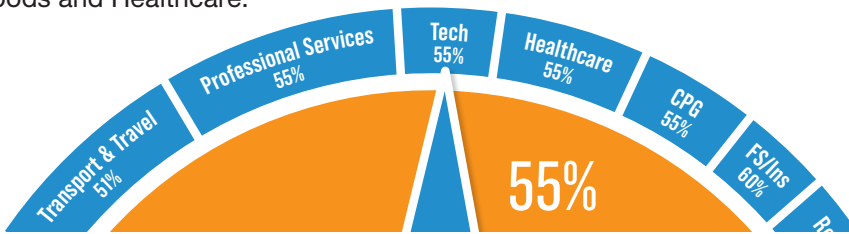
DIGITAL PULSE— TECHNOLOGY

“While Technology companies have the talent, are they lacking a digital direction?”

Surprisingly, Technology companies sit in the middle of the disruption barometer. Fifty-five percent of executives agreed their business will be moderately or massively disrupted in the next 12 months. Compare this with Telecommunications organizations: This figure is 63%. Having said that, 83% of respondents confirmed their organization has a digital strategy in place compared with the average of 73%. The talent within Technology organizations is one of the best across those surveyed—with 35% of respondents agreeing with the question “Do you have the right people to define your strategy?”—the highest across all sectors. Much like Telecommunications organizations, digital ownership is concentrated with the CEO and CMO in 70% of organizations. Conversely, Technology companies are the least likely to put digital under a dedicated head of digital, with ownership sitting here in only 3% of organizations. This is the low, matched only by the Transport and Travel sector. Much like their Telecommunications counterparts, the biggest single barrier that holds back Technology organizations is Functional Silos within the organization.

Digital Disruption Barometer

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



55% of Technology 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

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

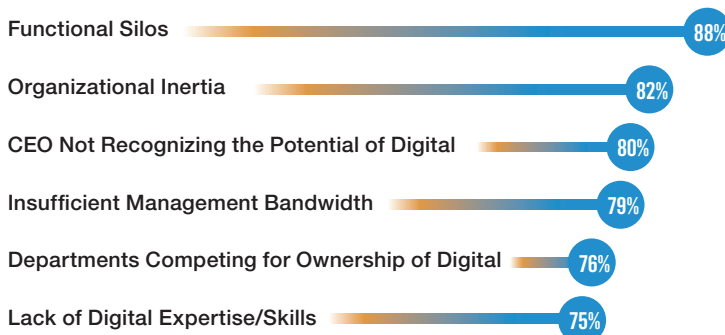
Percentage of Technology Executives: Functions Most Impacted by Digital in the Next 12 Months



Five Top Barriers to Effective Digital Business

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

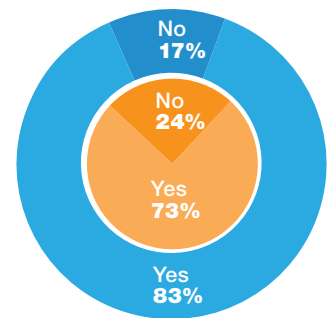
Percentage of Technology Executives Rating Barriers as of High or Moderate Significance



Structure and Strategy

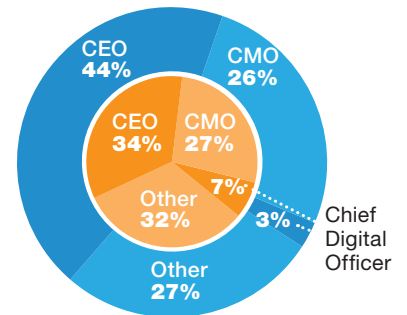
Does your company have a digital strategy?

● Technology
● Total



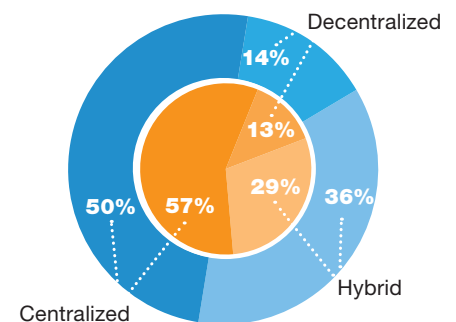
Who owns digital in your organization?

● Technology
● Total



How is digital organized in your organization?

● Technology
● Total

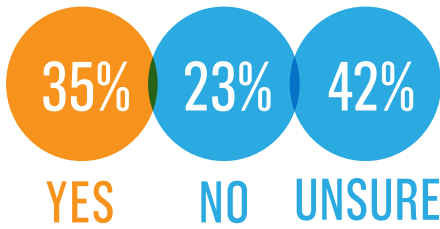


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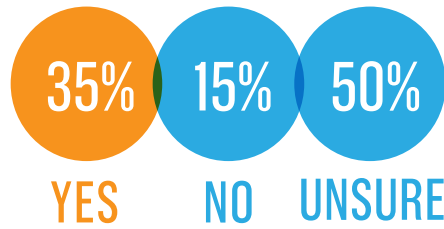
The People Challenge of Digital

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

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



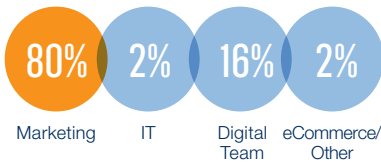
Do you have the right people to execute your digital strategy?



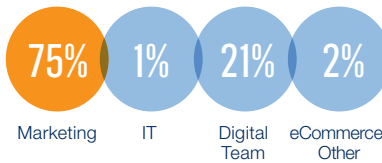
Ownership of Digital within Organizations

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 Technology organizations as digital's logical home(s).

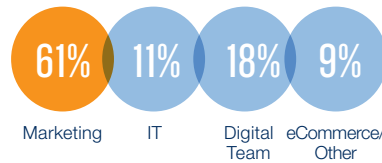
Social Media Marketing



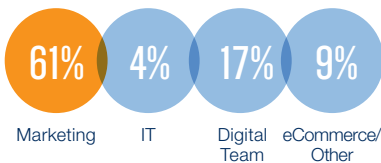
Digital Media Selection



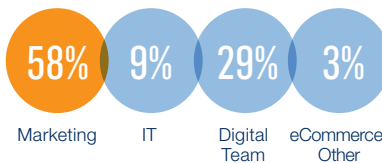
Social Media CRM



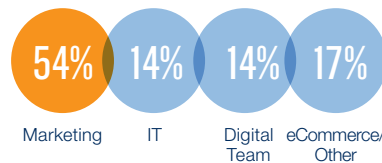
Customer Mobile App Development



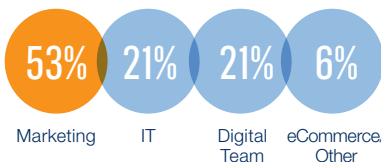
Customer Experience Strategy



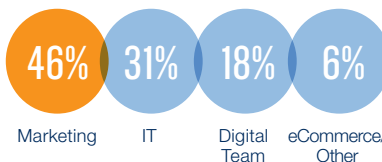
Vendor Selection



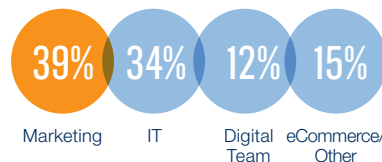
Web Design



Customer Analytics

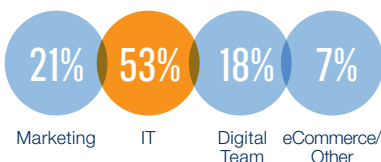


Employee Digital Engagement

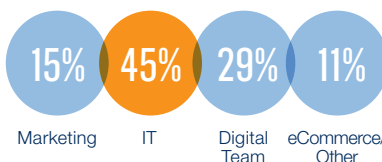


Notable exceptions include **CRM** and **Web Strategy**, which most often are owned by IT.

CRM



Web Strategy



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