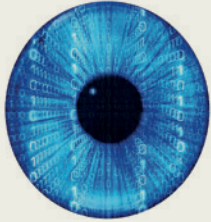


# Drive or Delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia





## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

# Perface

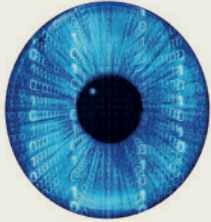
*Drive or delegate? Digital workplace strategy, talent management & the role of the CEO in Asia* is an Economist Corporate Network (ECN) report. It is based on a survey of the primary members (Regional/Country CEO/President) of the 500+ ECN clients based in the Asia Pacific region. The report was sponsored on a regional basis by Hays. The findings and views expressed in this report are those of the ECN alone and do not necessarily reflect the views of the sponsors.

The report was written and edited by Andrew Staples in Tokyo with editorial input and assistance from Mary Boyd in Shanghai and Pamela Qiu in Singapore. Gaddi Tam in Hong Kong was responsible for design.

We would like to thank all the respondents and focus group participants for their time and input.

November 2015

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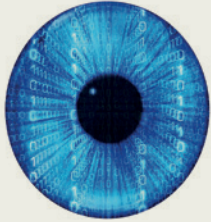


## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

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## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

# Key findings

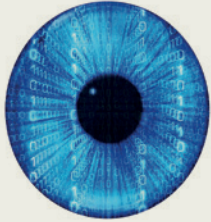
## A quick read of the brief and its findings

### We asked:

- Who and what drives the digital workplace strategy?
- The extent to which CEOs are taking ownership of the digital agenda?
- How well CEOs understand the demands of the next generation of leaders?
- What is best practice when it comes to realizing the potential of a digital workplace strategy to develop and retain core employees?

### We learn that:

- Business leaders in the region view a digital workplace strategy primarily in terms of driving business transformation
- CEOs understand the relationship between digital and talent but one third of respondents doubt that they are offering an attractive workplace environment for the next generation of top talent
- There is an even split between organizations that describe themselves as proactive and conservative when it comes to adopting a digital workplace strategy
- Slightly more than half of all CEOs delegate rather than drive digital
- 70% of business leaders think it important to use social media, but less than half do so to engage with employees
- In terms of talent management, a digital workplace strategy is seen chiefly as a means to facilitate collaborative working
- Cultural and societal norms in the region may impede the adoption of flexible working practices and the promotion of diversity



## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

# Introduction

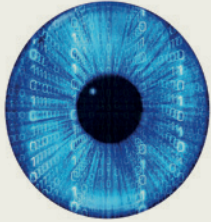
## Asia's business leaders share their thoughts on the digital workplace and talent management in Asia

Digital disruption—*changes enabled by technology that disrupt established patterns and processes of business*—impacts every feature of the business model, and not least in terms of the management and development of an organization's human capital.

People analytics, for instance, can facilitate much better decision making around talent acquisition, performance management and diversity. And as technology continues to percolate throughout the professional and personal lives of high-performance talent, the ways in which a firm's leadership approaches technology adoption and usage have increased bearing on employee engagement. For these individuals (if not increasingly for all employees), choices about device management policies, training or tele-working, for instance, all send important signals about the type of culture the organization's leadership is creating—and prompt decisions about whether they wish to grow with it, or move on.

At the same time, digital choices must consider the cultural and organizational realities of the Asian business environment and go beyond the adoption of new technology for its own sake. Tomorrow's workforce will be more diverse, dispersed and demanding. In this environment the ability to attract, develop and retain the best that the labour pool has to offer becomes a strategic imperative.

This new paper from the Economist Corporate Network examines the CEO's perception of the digital challenge as it pertains to the organization's human capital, and explores the extent to which CEOs are taking ownership of the digital agenda in Asia. We conducted a survey of our 500+ clients across Asia Pacific through October 2015. Focus group meetings with a small number of invited CEOs were then held in Shanghai, Singapore and Tokyo to discuss the findings in the local context. This paper is a summary of both the survey and focus group discussions.



## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

# Where are we with digital workplace strategy?

## What drives, and how do business leaders in Asia perceive, the move toward a digital workplace?

### Defining terms

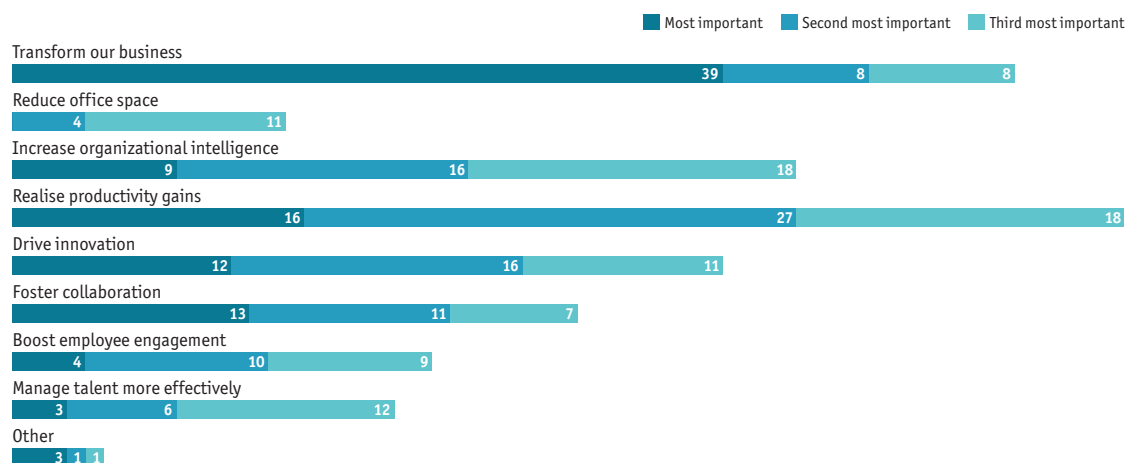
For the purpose of this survey, we defined the digital workplace as *‘the collection of all the digital tools provided by an organization to allow its employees to do their jobs, foster collaboration, innovation and flexible working’*. Yet we wanted to discover if CEOs see ‘digital’ in the same way, what drives a digital workplace strategy and, indeed, if there is anything strategic about the use of technology in the sense that there is an ongoing and deliberate approach to forge a new working environment.

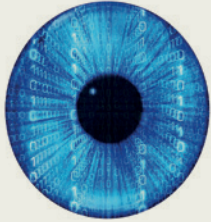
### What drives a digital workplace strategy?

Chart 1 shows that CEOs regard a digital workplace strategy as, most importantly, a means to *transform the business from within and to boost productivity*. Interestingly *boosting employee engagement and managing talent more effectively* appear to be less important factors. This may be accounted for when we consider that business today can in many ways be said to be operating under the principle of ‘digitize or die’. But it also reflects the reality that the focus in recent years has been largely on the digital transformation of client facing parts of the business. In these companies there is now a pressing need to take a fresh look at how employees work, interact and collaborate so as to minimize any gap between a cutting edge customer experience and a decidedly last century working environment. Indeed, as noted in the introduction, creating an attractive workplace experience is becoming an increasingly important aspect of the organization’s ability to attract and retain top talent.

**Chart 1: What is a digital workplace for?**

(% of respondents)





## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

### Sharing information effectively

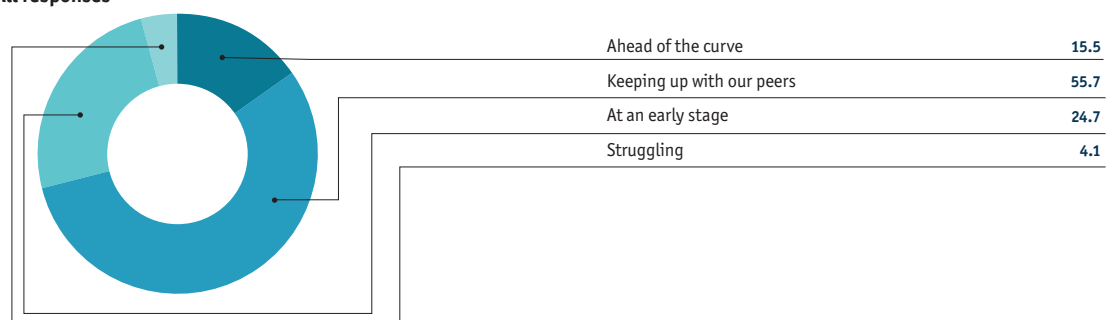
CEOs reported that one of primary challenges they are struggling with in terms of advancing their own company's digital transformation strategy is the lack of information across the organization about what works and what doesn't. This concern is reflected in the chart above whereby *sharing organizational intelligence* sits in third place as a key driver of the digital workplace strategy. As the CEO of a global marketing and consulting company that provides business, marketing, and technology services notes, "The technology should be seamless. Yet the bit that we really struggle with a company is that we don't have a good way of learning from each other. We have so many different markets that are solving exactly the same problems. And while other teams have already found the solutions to our problems, we just don't have a good way for harnessing this information. The information on the stuff that has already been done, that has already been thought through, and already been cracked, this just isn't accessible. As a result the time and energy that is taken in just replicating the same solution, and in every market, is just phenomenal. Fundamentally, we need to find a way to collate, centralize and control the information we already have. A lot of the clients that we work with are facing this problem of information management too." This quote also suggests that firms may be well advised to give greater thought to how better to *foster collaboration among employees*.

### Leading the pack?

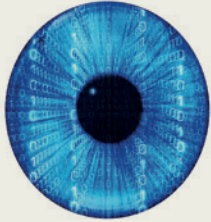
Having established what drives strategy, we then asked where respondents felt they were relative to their peers. Encouragingly, just over 70% suggest that they are either *ahead of the curve or keeping up with peers*. Yet a quarter suggest they are at an early stage, with a small minority (4%) reporting that they are *struggling*. The message is clear: if you aren't pursuing a digital workplace, your peers (and competitors) most likely are. Location, however, seems to influence progress. When we ran a filter for Japan based respondents, we found that 20% report they are struggling and that none felt they were ahead of the curve. Given this result, we dug a little deeper during the Tokyo focus group luncheon and discovered a range of issues that seem to retard the transformation of the workplace including a strata of middle-management that may feel threatened by new technology and thus resistant to change, and a perceived continuing necessity for 'in-office presence'.

**Chart 2: When it comes to implementing a digital workplace strategy, we are:**  
(% of respondents)

All responses



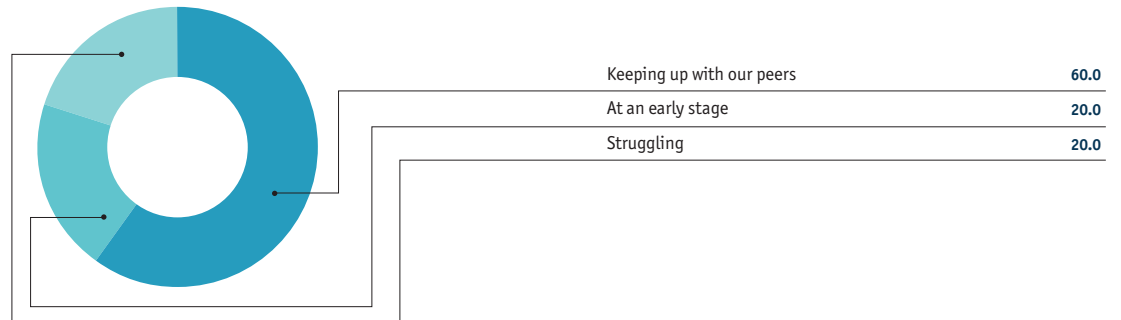




## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

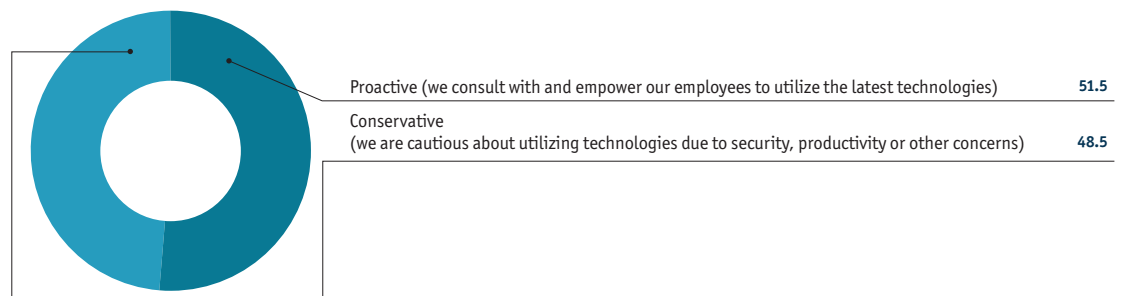
### Japan based responses



## Trailblazer or tied-up?

CEOs were asked to identify whether their approach to the digital workplace could be described as *proactive* or *conservative*. A proactive approach, we suggest, could be described as one where employees are consulted with and empowered to use the latest technologies whereas a more conservative stance would be one where the organization is cautious about utilizing technologies due to security, productivity or other concerns. An almost even split between the two responses at the regional level suggests that the digital workplace is yet to be universally embraced. Yet in some locations, a very different picture emerges. 80% of Japan based respondents described themselves as conservative in their approach to the digital workplace, for instance.

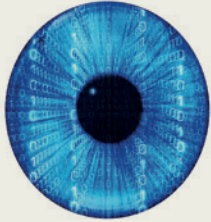
**Chart 3: Our approach to the digital workplace could be described as:**  
(% of respondents)



## Pulling together

While 68% of respondents indicated that the *digital workplace strategy is a collaborative effort*, nearly a third reported that, perhaps unsurprisingly, IT heads take the lead. Again, this varies by location: IT seems to take much more of a lead in India (55%) whereas HR is more involved in geographies such as Japan and Greater China. Establishing a cross-functional team to audit and develop the organization's digital workplace environment would appear to be an example of best practice as it offers an opportunity for the various functions of the organization to align with the CEOs vision. We explore this further in the following section.



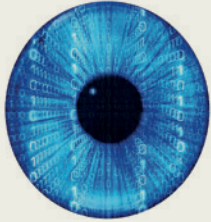


## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

### Summary points

- The value of a digital workplace is seen primarily in terms of driving business transformation
- Only a small percentage of CEOs (15.5%) feel they are ahead of the curve when it comes to implementing a digital workplace strategy
- Establishing cross-functional teams to develop and implement a digital workplace strategy allows for greater buy-in of, and alignment with, top line strategic vision



## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

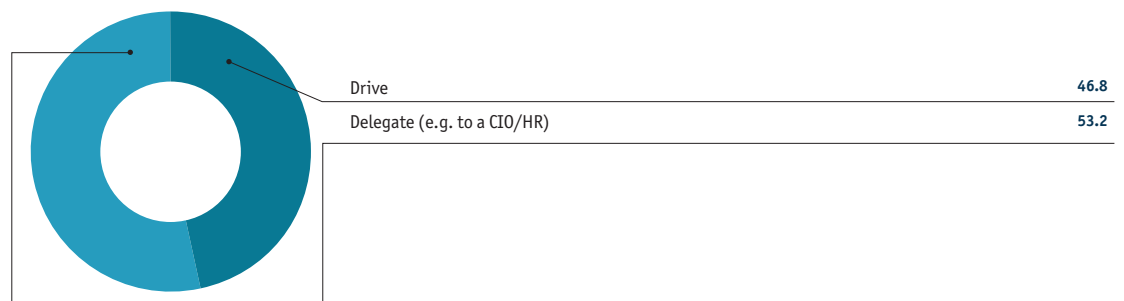
# CEO engagement with digital workplace strategy

## Do CEOs drive or delegate when it comes to the digital workplace?

### Drive or delegate?

Top performing companies tend to have CEOs who are active digital champions. A recent survey<sup>1</sup> found that CEOs who are digital leaders do not 'delegate digital or view it as a separate strategy'. If so, then our findings suggest that there is considerable scope for CEOs in Asia to assume a greater role in driving a digital workplace strategy as just under half (47%) claim to be doing so.

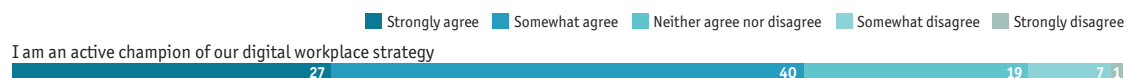
**Chart 4: When it comes to our digital workplace strategy, as CEO I:**  
(% of respondents)



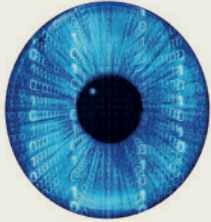
### Are we on the same page?

But does this reflect the case that a majority of our respondents are country heads and therefore presumably implementing the vision of the global CEO rather than defining it? The fact that 70% of respondents across the region indicated that they are active champions of a digital workplace and the same number reported that they would have no problem in articulating the digital workplace strategy indicates that the importance of proactive advocacy of the digital strategy is well understood (see charts 5 and 6 below).

**Chart 5: Active champions?**  
(% of respondents)



<sup>1</sup> PwC, 17th Annual Global CEO Survey, 2014



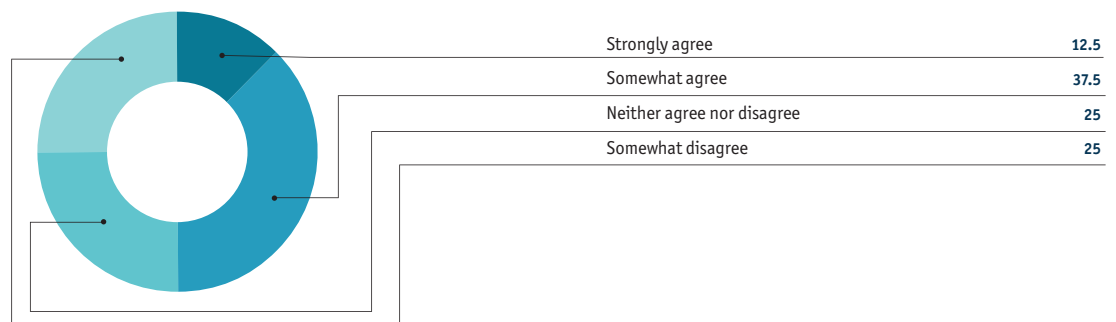
## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

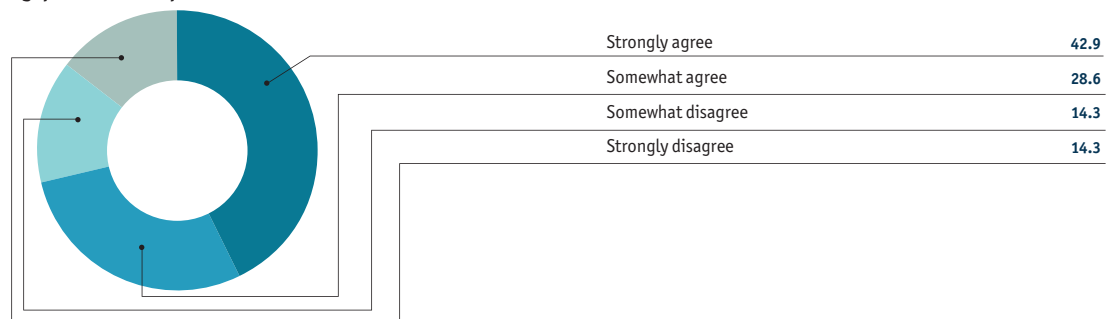
Yet somewhat different stories emerge when we break these data down at the national level. Business leaders based in Greater China (mainland China, Hong Kong and Taiwan for the purposes of this survey) appear to be less clear on what strategy is when compared to the regional response. Here, 50% responded positively to the statement 'As CEO, I would have no difficulty articulating our digital workplace strategy' (compared to 60% for the region as a whole) but a full quarter disagrees, compared to the regional result of 13%. Interestingly, a more black and white picture emerged in Singapore, where 70% responded positively ('agree' or 'strongly agree') and the remaining 30% either disagreed or strongly disagreed; there appeared to be no middle ground.

**Chart 6: As CEO, I would have no difficulty in articulating our digital workplace strategy**  
(% of respondents)

### Greater China



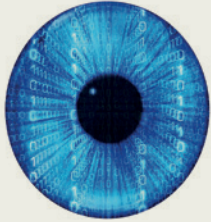
### Singapore based responses



## Sharing the vision

Of perhaps greater concern, however, is that fact that only a *minority of business leaders describe their senior management team as digital workplace champions*. This perhaps suggests a need for a closer look at training and development programmes as a way to better disseminate the value of a digital workplace strategy. And this is not just with reference to the senior management team: nearly a quarter of respondents also indicated that *the digital message was not clearly communicated to the workforce*.

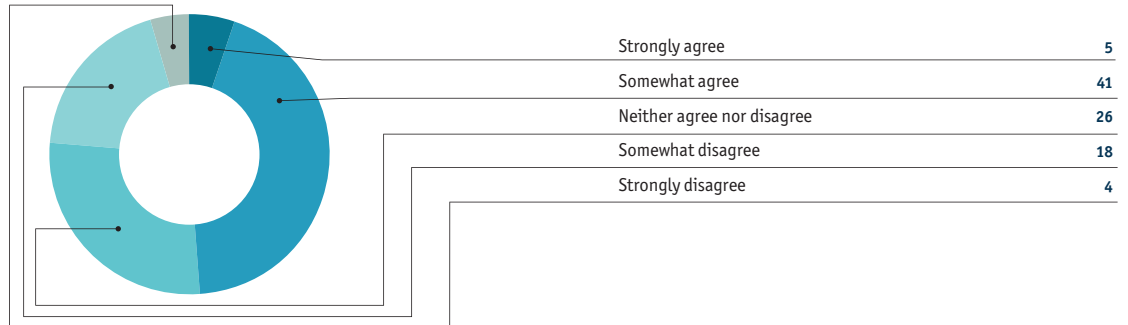
Understood correctly, a digital workplace strategy should be seen as an integral component of overall business strategy—the key concern for the CEO and his or her senior management team.



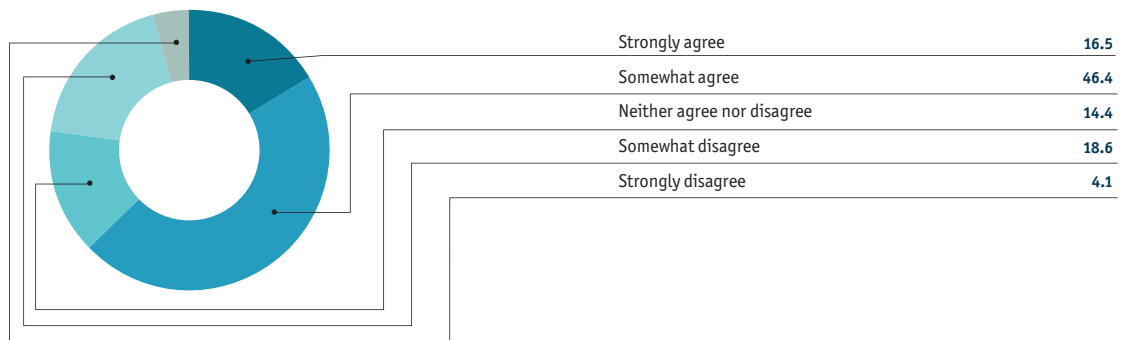
## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

**Chart 7: My senior management team could all be described as digital workplace champions**  
(% of respondents)



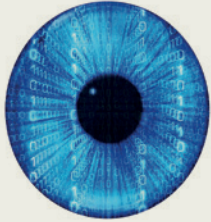
**Chart 8: Our digital workplace strategy is clearly communicated to our employees**  
(% of respondents)



Viewed as such, technology becomes a tool to allow employees to work toward the shared vision of the organization. It may also be seen in terms of changing the corporate culture and individual mindsets.

### Summary points

- CEOs need to take ownership of the digital agenda as a key component of overall business strategy
- Care should be taken to craft and communicate the message that a digital workplace strategy is an enabling tool for employees working towards a shared corporate vision
- Consider reaching out to a digital mentor and provide regular opportunities for you and your senior management team to get updated on key digital trends



## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

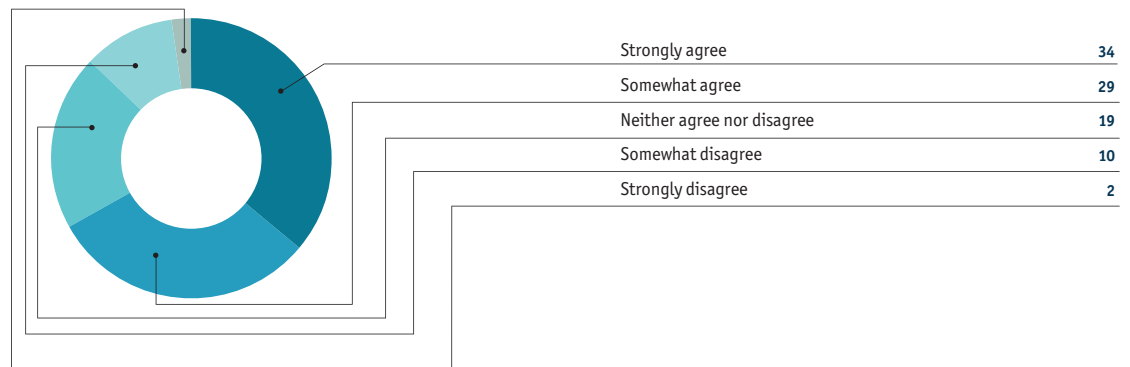
# CEOs, social media and talent management

## How important is it for CEOs to be utilizing social media

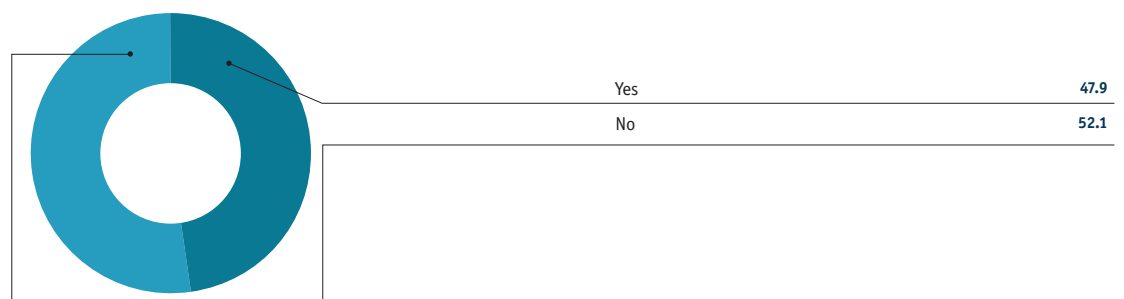
### Engaging with employees

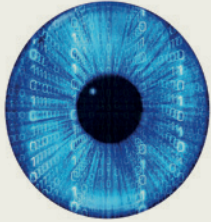
We asked our members whether it was important for them personally to be using social media. 70% agreed that it was with only a small minority (13%) responding negatively. In this digital era, this is perhaps not a surprising result, but then less than half (48%) went on to indicate that they actually use social media to engage with employees. Given that the use of social media is ubiquitous and increasingly the primary form of communication between people within and outside of the workplace, are those CEOs who are not utilizing social media to engage with their employees at risk of becoming out of touch and detached from their workforce?

**Chart 9: It is important for me personally to use social media**  
(% of respondents)



**Chart 10: I utilize social media to engage with employees**  
(% of respondents)





## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

### Swinging the other way

Some feel that given the rapid rise of digital technology in the workplace, there is the danger that companies are over-emphasising the need to incorporate digital solutions and digital platforms into work processes. One CEO of a global multinational insurance company in Singapore argued that, “in many aspects, we are over-digitalizing the way that we communicate and sometimes forget that there are a lot of messages—particularly around organizational change—that we need to deliver to people in the good old fashioned way, that is, face-to-face. Our company is now recognizing that perhaps too much communication is done on digital platforms; we are now giving our leaders and managers more and more training in soft-skills to help them initiate tough conversations and deliver controversial messages face-to-face, rather than going too far the other way.”

Indeed, CEOs at our focus lunches across the region agreed that face-to-face conversations as well as events like townhalls and internal corporate get-togethers should not be banished as outdated. Another CEO from a multinational HR company highlighted that while her firm’s global CEO blogs on their intranet at least once a month, less than a third of their staff read it. Yet, when this global CEO came to Singapore recently and conducted a townhall meeting, covering much of the same material that he had blogged about in the previous month, the feedback from staff was much more positive.

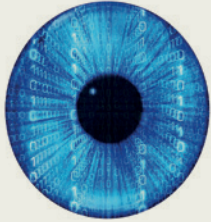
### Strategically social?

These concerns aside, we wanted to uncover the ways in which CEOs are currently utilizing social media networks or tools, and for what purpose. Interestingly, the vast majority view social media primarily as a means to communicate news and developments. Important, of course, but does using networks in this way—the electronic equivalent of a notice board in the canteen—allow CEOs to realise the full potential of social media? Moreover, *championing and driving the digital transformation* was seen as the least important aspect of social media.

At the same time, most respondents do appear to be proactively using the available tools to *be more approachable, tune into trending issues, promote employer brand* and seek out exceptional people. This final aspect of social media usage provides a useful segue to our next section where we explore the CEOs understanding of the relationship between *digital* and *talent*.

### Summary points

- Use social media strategically but also reflect on appropriate use
- Social media offers an opportunity to engage with and learn from your workforce
- In the Asian context, the personal approach remains important



## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

### Focus on social media: the view from China

The issue of social media as a communication tool within the workforce continues to elicit different responses from companies. All participants noted that social media was being used for customer communication and engagement, but that the special characteristics of China's social media landscape mean that China-based managers must modify or innovate local solutions. The popularity of the messaging app WeChat within China, as well as demarcation of social media groups along linguistic lines, effectively mean that use of WeChat is more fragmented compared to the more static model of a company-wide Intranet.

Some participants were very proactive in using company-wide WeChat accounts for marketing purposes, but were more cautious in using WeChat for informal employee communication due to security concerns. One participant described WeChat conversations within his company as the "conversation beyond the conversation", in that it was informal, and didn't leave a paper trail on the company email record. As such it had both pluses and minuses, as employees were often using it as an informal "helpline" to share information. Ironically, despite companies' anxieties about WeChat, even government regulators are now issuing regulatory updates through a WeChat format, although the formal announcements of policy changes are still communicated in the standard fashion.

Such hybrid behaviour is apparent in other sectors as well. Social media has grown to such a colossal scale in China that corporate communication teams are usually very proactive in monitoring social media platforms as part of their normal duties, so as to alert senior management whenever reputational risk may "go viral".

Other companies have utilized social media for different levels of employee engagement. Companies with decentralized employee teams have pioneered using social media platforms

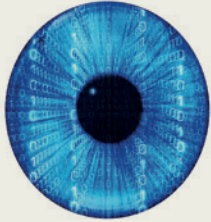
as a way to build staff morale, and also to disseminate important news items such as updates to safety procedures, relying on the social media platforms for educational and training purposes.

A few of the participants noted that their companies had evolved a "two-tier" strategy regarding the use of social media within corporate communication functions. The first social media channel (usually a WeChat account) would be official, for clients as well as employees to use, similar to a company website. One participant described this as the "straight face" of the company. A second, more informal WeChat account is reserved for employees' own use—and was described by one participant as "one of his company's best investments". The employees' WeChat account in his company attracts between 70-80% of employees, and the ubiquity of mobile phones amongst the workforce means that both blue collar and white collar employees have easy access to it (blue collar employees don't have access to company computers). The WeChat account features surveys, games, karaoke competition scores etc., and helps to build a sense of community.

The ubiquity of mobile phones in China, and the popularity of social media channels have prompted increasingly porous barriers between work and private hours. Employers acknowledge that staff (especially millennials) use social media channels while at work, but in return they usually respond to work-related messages and tasks after normal working hours.

Several participants noted behavioural change within the workforce due to excessive dependence on social media—one participant complained that it is an "anti-social" distraction during meetings or other face-to-face social interactions. Other participants noted growing language "gaps", as employees are now using "text message" spelling and grammar in business correspondence.





## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

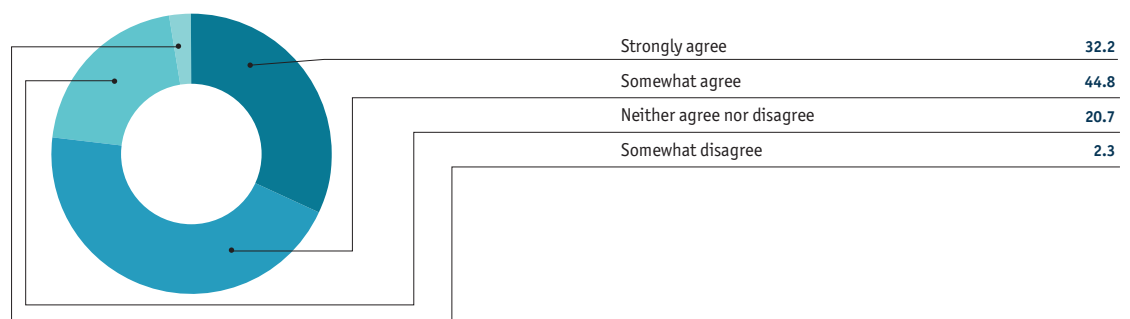
# The relationship between digital and talent

## How do business leaders perceive the relationship between digital and talent?

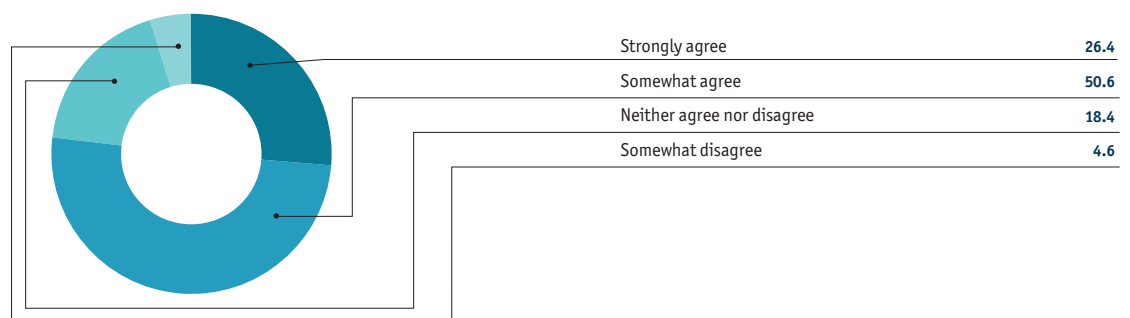
### Understanding the link

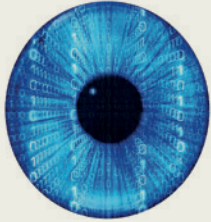
A key aim of our survey was to examine the link between an organization's digital culture and talent management. We felt that a good starting point would be to ask how CEOs perceive this relationship with a focus on the organization's ability to attract and retain top talent. Perhaps unsurprisingly, fully 77% agree that there is, further underlining the reality of this highly competitive segment of the labour pool. Digging a little deeper, we further asked whether respondents personally had a clear understanding of the relationship between the digital workplace and employee engagement and received a similar response. This is encouraging as without an understanding of this link, any attempt to define and implement a digital workplace strategy may be critically flawed.

**Chart 11: There is a link between an organisation's digital culture and the ability to attract and retain top talent**  
(% of respondents)



**Chart 12: I have a clear understanding of the relationship between the digital workplace and employee engagement**  
(% of respondents)



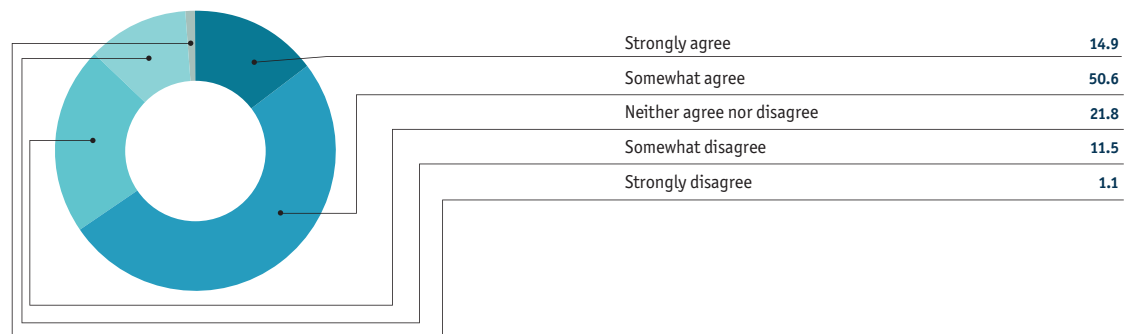


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A little less encouragingly, when we asked respondents if they are *confident that the organization is offering an attractive working environment for the next generation of top talent*—millennials are forecast to account for 75% of the workforce by 2025—confidence levels dropped somewhat.

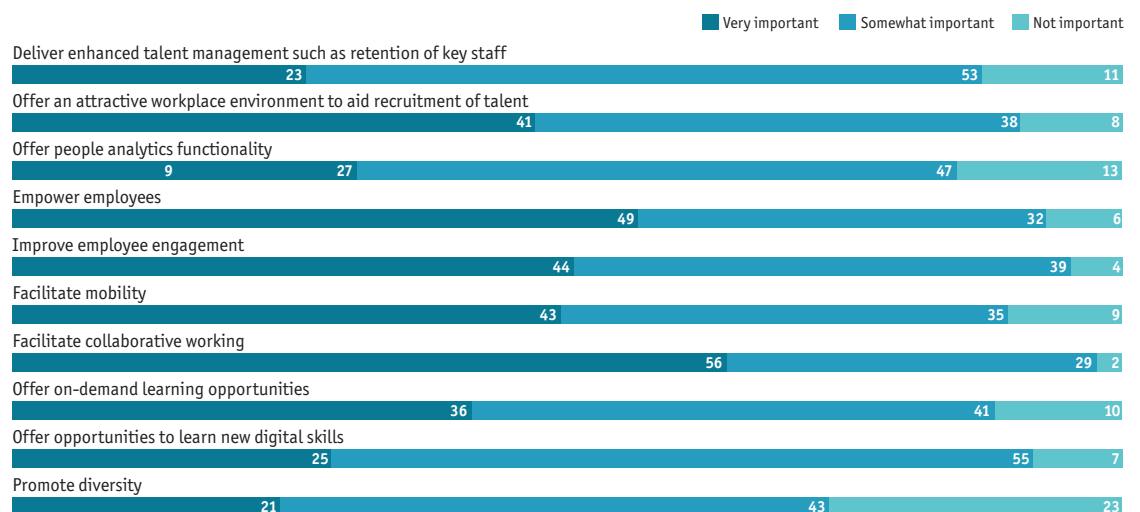
**Chart 13: I am confident that we offer an attractive working environment for Generation Y millennials**  
(% of respondents)

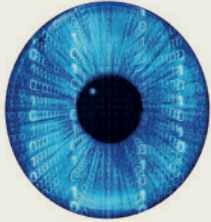


Going further, we asked in what ways talent management issues are explicitly considered when the digital workplace strategy is drawn up. A desire to *facilitate collaborative working, improve employee engagement and to empower employees* stand out as the key drivers of the digital workplace strategy as it pertains to talent management.

On the other hand, promoting diversity was seen as the least important factor prompting the question of whether companies are missing on an opportunity to develop a more diverse workforce. Similarly, only 31% of respondents rated people analytics as a very important driver of strategy. However, one of the key promises of the digital workplace is that the data generated offers a powerful new way of learning more about your workforce, identifying exceptional people and providing

**In terms of talent management, our digital workplace strategy is designed to**  
(number of respondents)





## Drive or delegate?

Digital workplace strategy, talent management & the role of the CEO in Asia

feedback far more proactively than an annual assessment. This is a concept that has been grasped by GE where the formal annual performance review has been dumped in favour of a real-time Performance Development System delivered through an app.

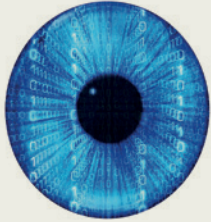
## Finding the right balance

A huge challenge for companies in the new digital era is finding the right balance between promoting the use digital platforms as well as ensuring that their workforces remain engaged with one other. In 2013, Marissa Meyer, the CEO of Yahoo!, made controversial headlines by banning the company's popular telecommuting policy in an effort to boost staff collaboration and innovation.

The CEOs at our focus group in Singapore also debated the merits and drawbacks of staff telecommuting, and agreed that the ideal was somewhere in the middle. "Finding the right balance is a cathartic process that companies need to go through in order to empower more people to work from home and realise the efficiencies that that brings, and also to recognize the downside risks around inability to build morale and drive engagement. The reality is that it's a middle ground—you can't park everyone outside the office and expect to have a highly engaged workforce. So it's about managing that, striking a balance between giving people the work-life balance and flexibility that they increasingly demand, and yet at the same time creating a collaborative atmosphere and workforce."

### Summary points

- CEOs recognize a strong link between an organization's digital culture and its ability to attract and retain top talent but.....
- .... are less confident that they are providing an attractive work environment for the next generation of top talent.
- It is important to find the right balance between flexibility and engagement



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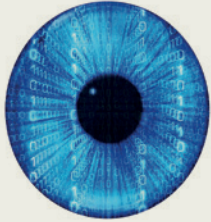
Digital workplace strategy, talent management & the role of the CEO in Asia

### Focus on talent management in Asian context

A common refrain among business leaders of global MNCs in Asia is the lack of local talent. Yet in reality, the local talent pool in Asia has huge potential, just that it has not been nurtured enough. As the CEO of the global insurance company at one of our focus group luncheons noted, "We have a terrific number of local market experts who have the respect of their local colleagues. But unfortunately, their experiences have been too limited. As a result, although they are smart and bright people with good local context, they have difficulties collaborating across different countries. In order to be effective in a global organization, they need to be exposed to more markets and more cultures. Providing the opportunities for this, including overseas assignments and rotation, is key. If we are serious about creating a much bigger generation of Asian CEOs and leaders, we need to invest much more significantly in their professional development."

A digital workplace strategy could become a key component of developing local talent yet cultural and societal factors in the region may act to retard this process. CEOs at our Tokyo focus group, for instance, highlighted the issue of a generational influence on the workplace in the form of a tension between younger, tech savvy employees and older generations set in more traditional modes of work. Use of ICT in Japan may be well advanced in society, as any commuter on a Tokyo train will tell, but remains retarded in many workplaces which may go some way to explaining Japan's lackluster productivity outside of the global manufacturing giants like Toyota. A preference for face to face meetings and a perceived need to be seen in the workplace also impedes the adoption of technology.

Yet these issues can be overcome if the CEO is able to successfully communicate that a digital workplace strategy is, fundamentally, about empowering individuals to pursue success. And success, in this highly competitive region of the global economy, means survival.



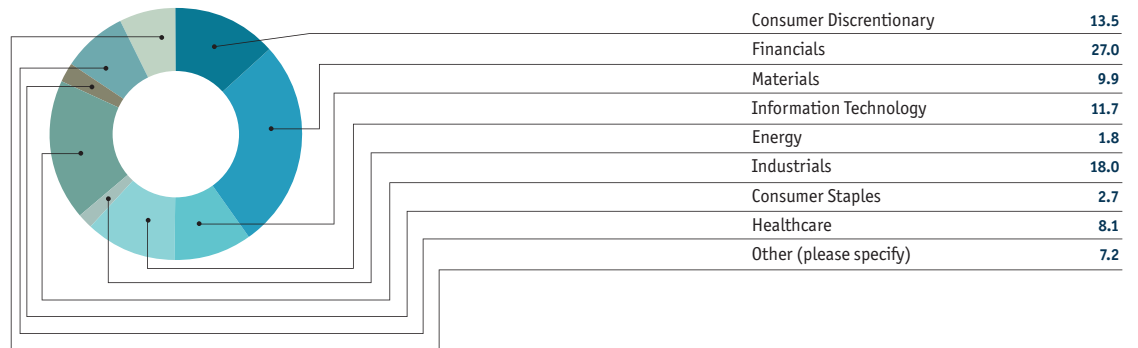
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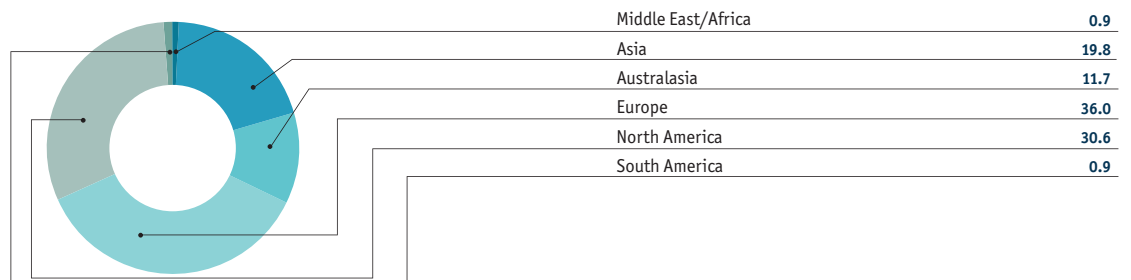
# Appendix

## Participant data

### What sector do you operate in? (% of respondents)

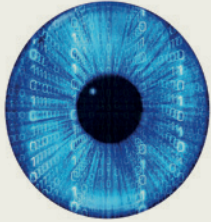


### Where is your firm's global HQ? (% of respondents)



### Where is the location of the entity that you manage? (% of respondents)





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### What were your firm's global revenues for its latest financial year?

(% of respondents)



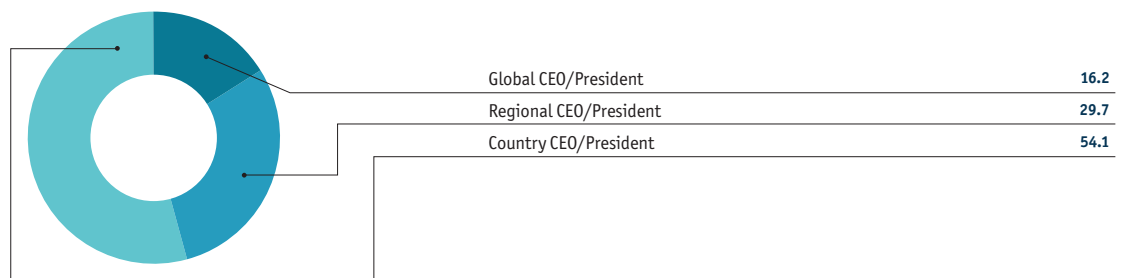
### What were the revenues for the entity that you manage (regional/country) for latest financial year?

(% of respondents)



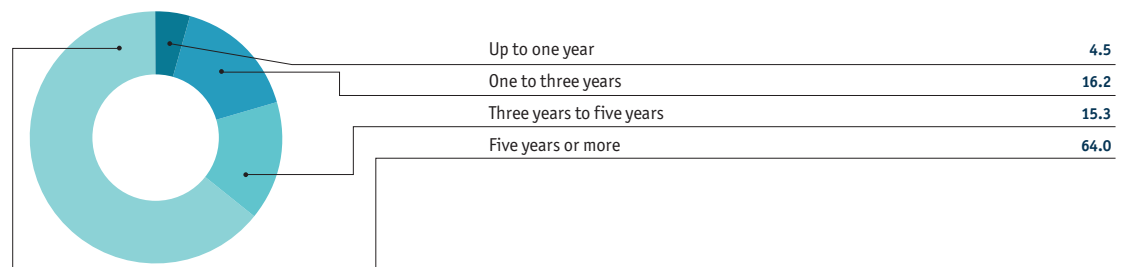
### Geographic scope of your responsibilities

(% of respondents)



### Total years in an executive (C-suite) position

(% of respondents)



## About Economist Corporate Network Asia

Economist Corporate Network (ECN) is The Economist Group's advisory, briefing and networking service for Asia-based senior executives seeking insight into economic and business trends in key growth markets. Through a tailored blend of interactive meetings, high-calibre research, and private client briefings, ECN Asia delivers country-by-country, regional, global and industry-focused analysis.

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