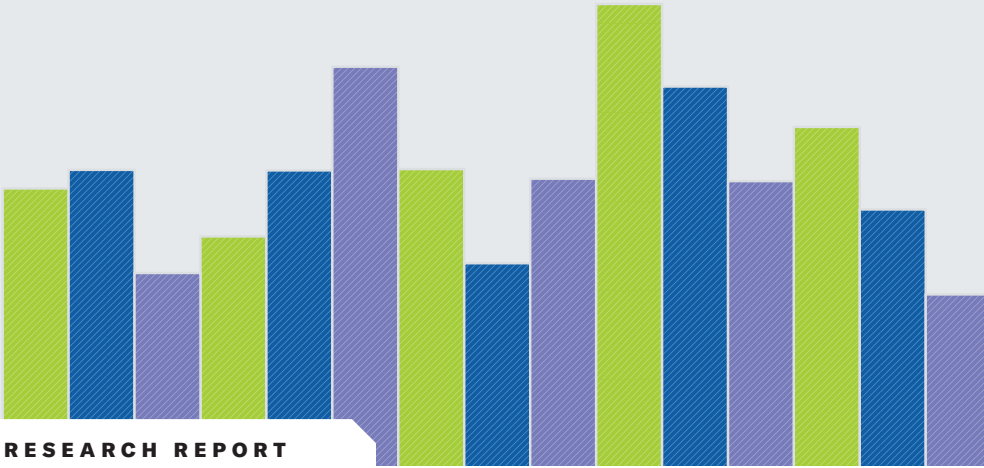




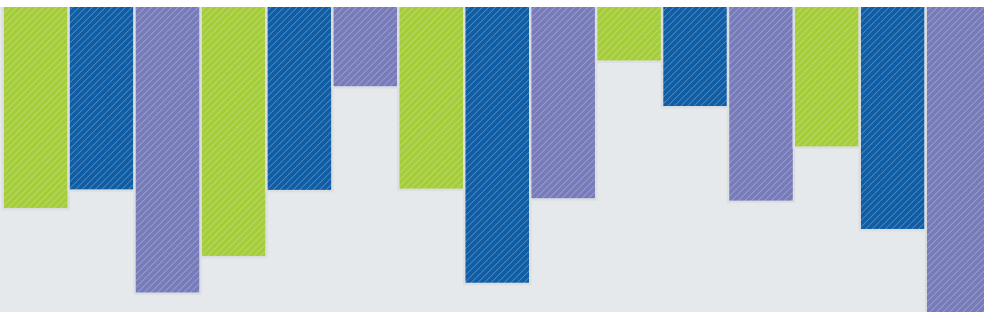
**Harvard
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ANALYTIC SERVICES



RESEARCH REPORT

Seizing the Business Value of Cloud for Demanding Times



Sponsored by



Cloud Takes Center Stage in the Covid-19 Era and Beyond

The effort to continue business and maintain operations during the Covid-19 era and beyond has put cloud computing at center stage for organizations.

Covid-19 has made enterprises aware of the need to learn and scale quickly in a fast-moving business environment. We have seen many examples of how even brief delays and hesitations have caused business escalations and societal disruptions. A robust and scalable cloud strategy helps organizations stay agile while enabling new business models, ensuring business continuity, increasing workforce productivity, addressing security risks, managing demand volatility, and enhancing customer experience. Cloud computing also helps in quickly pivoting to fully remote working.

In this regard, I am happy to share with you the insights and findings from the research we have done in collaboration with Harvard Business Review Analytic Services. In the global research survey of 484 senior technology executives, 55% say the biggest driver for cloud adoption is increased business agility.

Key findings from the research include:

- The factors that once drove companies to consider cloud computing such as scalability, improving efficiency, and variabilization of costs are now a given. Cloud computing has emerged as a critical component to drive the business transformation—key to a return to growth.
- Business success will increasingly depend on organizations' ability to invest intelligently in technology such as data, analytics, and machine learning and leverage the right computing strategy to innovate and increase competitiveness in the future.
- The use of hybrid multi-cloud continues to grow.
- Though the case for cloud computing is clear, organizations struggle to make a transformational case for cloud as security and legacy concerns persist.

Wipro is uniquely positioned to enable enterprises and lead our customers' cloud journeys through a business-first, design-led strategy powered by an industrialized solutions approach. Wipro has strategic relationships with all the leading cloud hyper-scalers and is actively engaged with many organizations globally to drive business transformation powered by the cloud.

There's never been a more important time for organizations to revive and reexamine their cloud strategy and execution. I am confident that this new research from Wipro and Harvard Business Review Analytic Services will offer you strong and compelling insights to drive your thinking. I will be delighted to have your feedback on this research and will be happy to engage with you in your cloud journey.

Here's to a cloud-driven future.



Ramesh Nagarajan
Senior Vice President,
Cloud Services
Wipro Ltd.

Seizing the Business Value of Cloud for Demanding Times

When cloud computing first emerged as an alternative solution to on-premises IT systems, the primary drivers were decreasing costs and increasing efficiency. Today, however, decreasing costs and increasing efficiency are mere table stakes, and change was in the air even before Covid-19 reinforced to enterprises the need to learn and scale quickly in a fast-moving and often uncertain business environment.

Nearly three-quarters (73%) of the 484 executives familiar with their organization's cloud strategy who were recently surveyed by Harvard Business Review Analytic Services say that over the next five years, effective integration and management of their IT systems environment will be very important to business performance. Respondents report that they are adopting cloud computing options in order to improve their business agility, flexibility, and ability to access and analyze data and act on that insight. What's more, there is a universal recognition among them that increasingly important capabilities like big data analytics, collaboration and communication tools, and artificial intelligence (AI) and machine learning will require a cloud computing architecture in order to function optimally and deliver expected benefits.

As a result, experts say that an organization's cloud investments and strategy are now foundational elements for their digital transformation and essential for competitive differentiation.

"Cloud is no longer just an IT mandate; it's the fulcrum of digital business," says Yugal Joshi, vice president at Everest Group. "In the same way that cybersecurity rose to the C-suite level and board agenda, cloud has become part of business transformation initiatives critical to driving success not only today but in the future."

The transformational business case for cloud computing, then, is clear. However, for many, the path to successful cloud adoption is still aspirational.

HIGHLIGHTS



73% of survey respondents say **effective integration and management of their IT systems environment** will be very important to business performance over the next five years, but less than 30% say they are very effective at either.



55% say the most significant driver for cloud adoption is **increased business agility**.



31% say their organization's cloud computing strategy is **highly effective in supporting their strategic goals**.



“If you’re ignoring the possibilities that cloud presents, you’re holding your company back,” says Jeanne Ross, principal research scientist at MIT Center for Information Systems Research.

Currently, less than a third of respondents surveyed (31%) say that their cloud strategy is highly effective in supporting their strategic goals, making them leaders among survey respondents. These leaders are more prevalent in North America (39% say their cloud strategy is effective) and Europe (24%) than Asia (18%) or the rest of the world (9%).

These leaders are characterized by more extensive use of public cloud solutions to manage current data-related workloads, the survey shows. They are substantially more effective in the management of their IT systems environments, with far greater levels of system integration and agility than others. They also strongly believe that they need the right cloud computing resources to optimize game-changing capabilities like machine learning.

Still, even for leaders, significant challenges persist both in making clear the transformational business case for cloud computing and in integrating and managing heterogeneous cloud and non-cloud solutions. What’s heartening is that those organizations out in front are beginning to reap the benefits of their cloud computing strategies. They have achieved greater levels of agility and flexibility and more significant improvements in speed to market and customer experience than their counterparts. They are more likely to report substantial upticks in operational efficiency, new product and service introduction, and revenue. As a result, their approaches are instructive for other organizations seeking to compete in the cloud-enabled future.

“If you’re ignoring the possibilities that cloud presents, you’re holding your company back,” says MIT Center for Information Systems Research (CISR) principal research scientist Jeanne Ross, who has conducted a study of companies making dramatic changes and found cloud to be an essential component of those efforts. “If you don’t change the underlying technology base, you won’t transform.”

Agility, Flexibility, Data-Driven Insight

“In the early days, cloud service providers offered a cost-effective, scalable alternative to what organizations could provide in their own data centers,” says Stephanie Radlick, cloud strategy and transformation advisor at Pace Harmon. “The value proposition was just that.”

But in recent years, the approach to cloud has evolved. “The growing pace of change in the business environment is forcing enterprises to look for ways to gain agility and

flexibility across the organization, including the IT delivery platform,” says Deepak Mohan, research director in the infrastructure systems, platforms, and technologies group at IDC. “Companies want to expand their footprint, extend their reach faster, and change plans when needed—and they’re realizing that cloud enables this flexibility.”

Organizations are looking for more than just bottom-line cost reductions from the cloud and they’re seeing top-line growth. In fact, other benefits that have emerged from increased use of the cloud include improved customer service and better support for collaboration. “Now people realize that there are more things you can focus on than operational efficiency,” says Joshi of Everest Group.

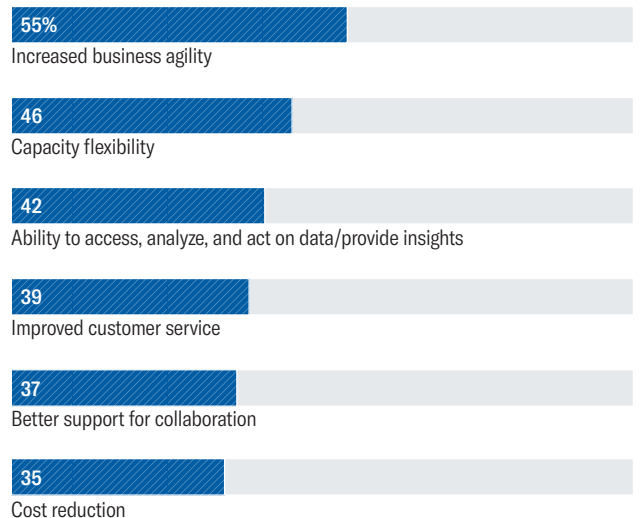
Respondents say the biggest drivers behind organizations’ adoption of cloud computing are increased business agility; flexibility of capacity; and the ability to access, analyze,

FIGURE 1

Strategic Rationale Drives Cloud Computing Adoption

Companies are looking to the cloud to provide business value beyond basic cost-cutting.

What are the biggest business drivers for the adoption of cloud computing in your organization? (UP TO FIVE ANSWERS)



Source: Harvard Business Review Analytic Services Survey, February 2020

and act on data to generate meaningful insights. **FIGURE 1** Respondents in Asia, however, were more likely to focus on cost, with 45% of them citing cost reduction as one of their biggest drivers (compared to 30% in North America and 33% in Europe).

Leading chief information officers are under enormous pressure to move fast today, says Dion Hinchcliffe, vice president and principal analyst at Constellation Research.

Cloud computing can enable that speed and responsiveness. “It is extremely important to have the right cloud strategy,” asserts Kiran Kanetkar, director of IT for Petco. “It provides a lot of agility to respond to quickly changing market dynamics. I realized early on that I had to make a strong business case to migrate everything into the cloud.”

A Future-Proof Foundation

Cloud computing has even emerged as a critical component of digital transformation. “It is strategic,” says Geoff Wollacott, senior strategy consultant and principal analyst at Technology Business Research.

Indeed, respondents indicated that cloud computing is intrinsically linked to the success of technologies that they say will be critical to their businesses over the next five years, such as collaboration and communication tools, big data analytics, artificial intelligence (AI) and machine learning, and internet of things (IoT) technologies. “Cloud computing is the basis of the next generation of technologies,” says Rajendra Deokar, principal program manager for the Microsoft Azure platform. **FIGURE 2**

Organizations that want to get into AI or IoT or blockchain have no choice but to adopt cloud solutions. “What you invest today for the organization will shape the future of the business,” says Hinchcliffe of Constellation Research. “Not only will it help you drive more efficiency and higher performance, but also get a competitive edge in the market through richer data insights. You get access to analytical power, which gives you more information to expand into new geographies, attract new customer segments, and deliver new products and services. If you fail to invest in the right strategy, you run the risk that you will not be relevant in the future.”

Such analytic capabilities and insight play an important role in helping organizations navigate severe disruptions, as has been revealed during the marketplace response to the Covid-19 crisis.

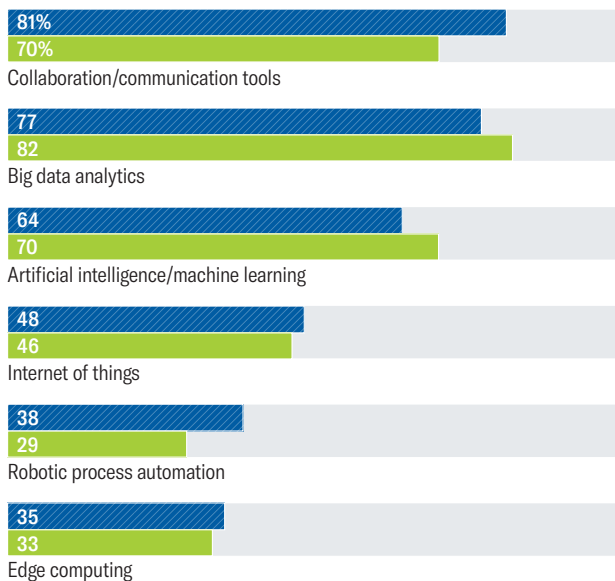
The public cloud, particularly, can deliver significant benefits when it comes to technology-enabled transformation. “What the public cloud providers bring to the table in terms of scale, performance, and geographic distribution cannot easily be replicated. Those are each key dependencies for things like data analytics and AI,” says Pace Harmon’s Radlick. “Cloud service providers also give companies access to innovation. They have some of the leading experts in these

FIGURE 2

Cloud Computing Underpins Future Tech

The effectiveness of key technology investments depends on the cloud.

- Very important to organizational performance over the next five years
- Requires the use of cloud computing to function most effectively



Source: Harvard Business Review Analytic Services Survey, February 2020

fields, and they’re making their offerings publicly available. They have moved beyond core building blocks to more value-added offerings in the areas of machine learning and AI, for example, giving companies the ability to extract more strategic value from the cloud.”

Organizations that want to leapfrog technologically can tap into a public cloud ecosystem of leading-edge technologies and expertise. “There are all the tools and higher-level technologies you can more easily deploy through cloud like AI, analytics, IoT, and blockchain,” says IDC’s Mohan. “The cloud is an easier way to get started with those than any other option. The cloud itself gives you a set of tools to change the organizational model to execute in a more agile fashion.”

Harnessing Hybrid Models

For most organizations, on-premises data centers remain a vital part of the mix. More than a third (38%) of respondents say that more than half of their data and workloads are managed on-premises today. Leaders, however, show a preference for the cloud: 42% say that more than half of their data and workloads are managed in the public cloud,

37% have the majority in the private cloud, and less than a quarter (24%) keep the majority on-premises. An increase in cloud adoption will be necessary if other organizations are to fully leverage the new technologies they say they need to succeed in the future. “Cloud penetration across industries is still low,” says Microsoft’s Deokar. “We are still in a transition phase.”

The options that organizations have when considering cloud computing models are numerous and complex. Today, around a fifth of organizations have a hybrid multi-cloud model in place. This usage is set to grow to 28% over the next two years, suggesting that the hybrid multi-cloud model is an emerging preference. And it is not just leaders who say this. By 2022, hybrid cloud models—including the hybrid mix of private and public cloud as well as hybrid multi-cloud approaches—will account for half of all solutions, up from 40% today. **FIGURE 3**

It’s clear that organizations have begun to see hybrid cloud models as the way forward. However, they may not have complete clarity about their options and which may best meet their business needs. “Cloud is the fabric going forward. There is no alternative. Most net new IT investment is going into

public cloud,” says Deokar. “While it’s still in the minority, in five years we will see massive growth. [In the meantime], organizations are figuring out hybrid cloud, what the right cloud strategy is, and what the benefits will be.”

Most enterprises have some mix of public and private cloud today, whether they know it or not, according to Mohan. “However, the level of integration varies,” he says. “In some cases, it’s tightly coupled, and in others, it’s loosely coupled.”

Managing Integration and Complexity

Hybrid and hybrid multi-cloud models require new skills, processes, and mindsets to be more effective. “The biggest challenge here is integration and management required to deliver a cloud experience that’s exactly like on-premises and vice versa,” says Mohan.

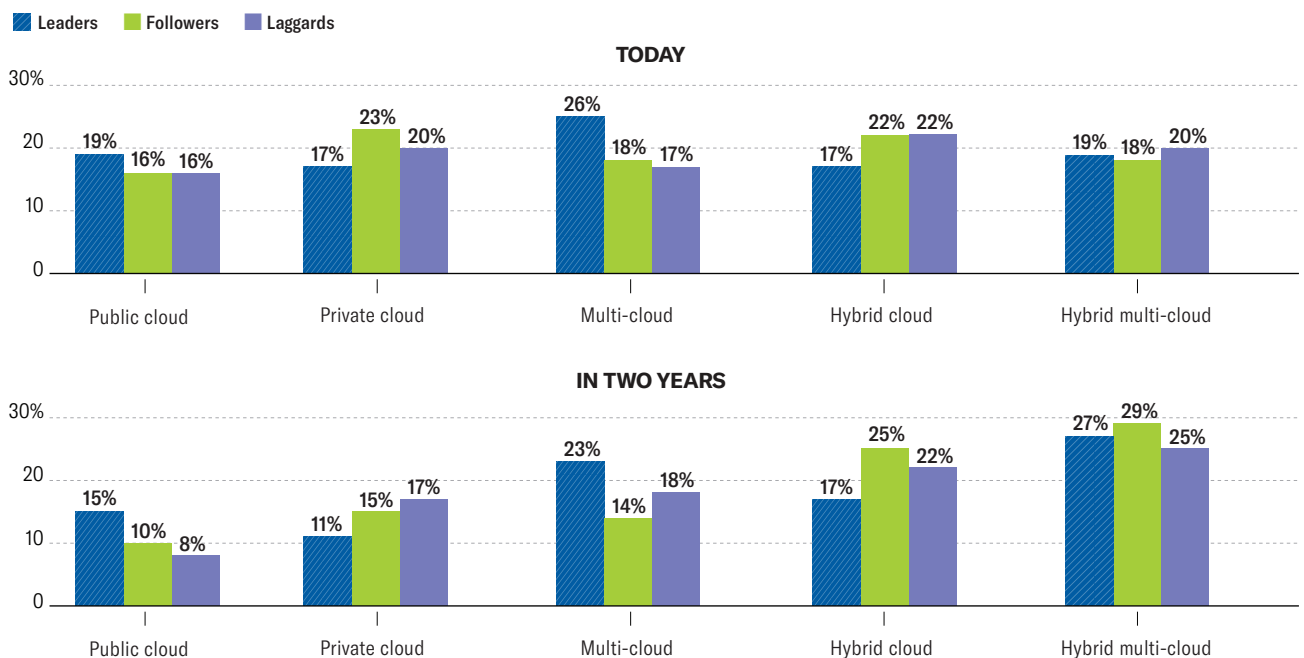
While it’s already been noted that nearly three-quarters of respondents put great importance on effective integration and management of IT systems when it comes to driving successful business performance over the next five years, few organizations are good at either one today. Just over a quarter (28%) of organizations have a very well-integrated

FIGURE 3

Toward a Hybrid Future

The hybrid multi-cloud model will grow most over the next two years.

Which of the following best describes the cloud computing model at your organization today and over the next two years?

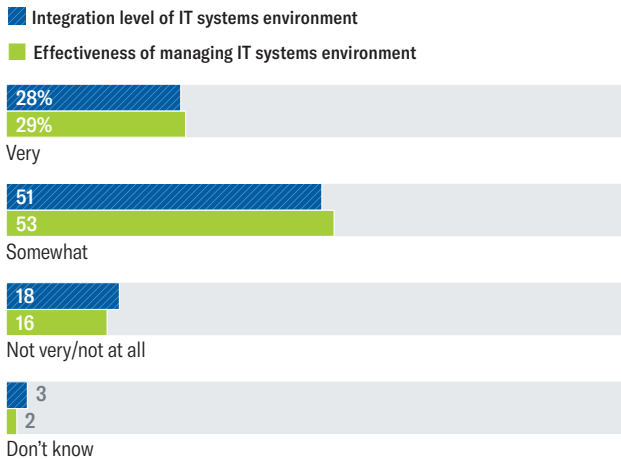


Source: Harvard Business Review Analytic Services Survey, February 2020

FIGURE 4

Organizations Struggle with Changing IT Environments

Few are very effective at integrating and managing their systems environment.



Source: Harvard Business Review Analytic Services Survey, February 2020

IT systems environment, and a similarly modest proportion (29%) say their IT systems management is very effective. **FIGURE 4** Respondents in North America are more likely to report high levels of integration—42% of the overall base in North America say their systems are very integrated, versus 31% of European respondents and 17% of Asian respondents. One-third of North American respondents say they are very effective at systems management, versus 24% of Asian respondents and 21% of European respondents.

Leaders are in a far stronger position when it comes to integrating and managing IT—66% of them say that their organizations are very effective at managing their IT systems environment, and 58% say their systems are very well integrated—but even they have work to do.

Respondents say the top three challenges in managing their IT systems environments are the complexity of the integration task (44%), getting data governance and management right (36%), and the diversity of skills required to deliver change (34%). “The future of IT is complexity management,” says Hinchcliffe.

Leaders have more of the necessary skills in their organizations, but they, too, face obstacles in fully integrating their systems. “It’s the biggest growing pain we see in adopting a cloud strategy: tools, people, and processes need to be revised to accommodate a hybrid environment,” says Radlick. “Certain things don’t translate in the public cloud. Organizations have to be aware of that to come up with mitigation strategies and a realistic roadmap to the cloud.”

Even the late adopters are now headed in the direction of the cloud, says Hinchcliffe. But “everyone is overconfident in their ability to manage the cloud,” he says. “It requires a completely different skill set. It’s like building a ship in a bottle: you don’t really control anything in terms of service providers and service level agreement, but you nonetheless have to manage it.”

Cloud services have evolved with different sets of tools and management approaches, so getting a handle on how to manage that diversity is difficult. “It’s one of the big disconnects,” says Mohan. “There are differences in workflows and audit and security tools that create friction points, especially if you have a large environment with a substantial existing IT footprint. One of the key areas enterprises need to pay attention to is bringing everything together under a common framework and set of tools, which will allow you to move faster and use the cloud better.”

That goal may not be entirely attainable, but it’s the direction leading companies are headed. “You may not be able to get to ‘one pane of glass’ to manage everything, but you want as few as possible,” says Joshi. “All of the vendors are driving toward creating a platform for managing on-premises and cloud resources, but we are fairly far from that end state.” In the meantime, enterprises must acquire the skills, either internally or through partnerships, to manage a heterogeneous set of workloads and platforms. “They need experience across a few technologies or an entire stack,” he says.

Mike Dosik, director of cloud operations and infrastructure at Jemstep, has experienced that logistical pain. “Many traditional IT systems, especially bespoke ones, and the organizations that support them are not designed or trained for taking advantage of the cloud. Forklifting a data center application into the cloud leaves you with an untrained team and an application not designed for the cloud,” he says. “The hurdles are around both reprogramming your teams and redesigning your applications.”

At Petco, Kanetkar has come against these hurdles, too. “Any large company like ours tends to have a number of different IT systems at different levels of maturity, and some of the new integration technologies may not be supported out of the box,” he explains. “The question is how do we integrate that and make the data available to all of our systems. The bigger concern is that many legacy systems are monolithic and not designed for agility. Modern agile capabilities like microservices architecture will not be available in monolithic legacy systems, so integration can take a lot of time.”

Making a Strategic Case for Cloud

Integrating and managing the evolving—and transformation-enabling—cloud environment requires significant investment. But that process also has proven to be problematic, in part



The best business cases are built on cloud computing as an operating model to help the organization explore new opportunities for growth in the future.

because organizations struggle to make a more strategic case for cloud.

Slightly less than two-thirds of respondents are finding it difficult to make a strong case for the transformational effect that cloud computing could have not just on their operations but on their business as a whole; 17% say it is very difficult and 45% describe it as somewhat difficult. The inability to make that business case is having a direct impact on their ability to secure the required investments.

Many business leaders may still view the cloud as tactical, which is a problem, says Jemstep's Dosik. In some cases, the adoption of cloud for transformation may not actually save money immediately. "Typically, a phased roadmap is important to drive short-term results that contribute to a longer-term strategic objective," Dosik says. Leaders have been more successful than followers or laggards in making the transformational case for cloud, but even slightly more than half of them (51%) find it challenging to convince those who make the big investment calls to put money into cloud adoption.

Security concerns and issues related to legacy systems are far and away the biggest inhibitors when it comes to evaluating and committing to potential cloud investments (cited by 32% and 31% of respondents, respectively, as a top-three barrier to greater adoption of cloud computing). "IT leaders are strapped to a legacy mountain because of the complexity of replacing those systems or migrating them," says Hinchcliffe.

Few executive teams or boards want to hear that the millions of dollars they've already invested in other technologies should be abandoned in favor of spending more millions on systems to deliver the same functionality. "That's what's challenging," says Hinchcliffe. "They don't realize they have to pay down this technical debt to get access to agility and new technologies, but they don't want to spend all that money. They want the transformation but don't want to invest in the cloud first to access it."

Most organizations are clearly in a bit of limbo, "especially in industries that don't have strong successful use cases," says Deokar. "That limits their ability to make that change and makes their job of having to convince management of this investment challenging. The business stakeholders or board needs to understand core capabilities of the cloud. But they're more concerned about security, privacy, and compliance and this huge investment made in existing data sets."

Eventually, says Joshi, "cloud will be the operating model for the enterprise, and the demarcation between legacy

and cloud will go away. But so much investment has been made in those legacy systems that shunning that may not be feasible." In the interim, most companies will determine which systems to move to the cloud in increments, creating the case as they go. "The key reason they struggle to make a strong transformational case is that business and IT do not make that case together," he says. "They need to collaborate."

IT can play a stronger leadership role in explaining the business benefits of cloud. "They can help leaders get their head around the fact that new things are possible," says Ross of MIT CISR. "It's becoming clear that the underlying tech backbone is inadequate. Cloud has to be part of the modernization strategy, and technologists can lead that. The great ones are stepping up to recognize this opportunity, articulate it well, and bring the business along in prioritizing this."

Kanetkar took such an approach at Petco. "Once I created a roadmap for this—a plan for migrating systems to the cloud and made clear the additional capabilities that would become available—it was easier to make the case," he says. "My [data and analytics] business users were already facing capacity and performance problems with existing infrastructure, so they saw a huge benefit to migration."

An overly optimistic business case, however, can make things worse. The best business cases are built on cloud computing as an operating model to help the organization explore new opportunities for growth in the future. "There has to be pragmatic thinking, as well," says Joshi. "Cloud does play an important part in being first to market and creating a good customer experience, which may *eventually* lead to greater revenue. But if you have unrealistic expectations for cloud adoption and you don't achieve them right away, the business may think that the cloud strategy failed. It didn't fail; the business case was wrong."

The ROI of Cloud

The challenges and pitfalls associated with cloud computing, from investment to integration and effective leveraging, may be significant, but they are well worth overcoming. Leaders are reaping the rewards of their efforts, most notably in business-critical areas. The cloud has made them far more agile, cost- and capacity-flexible, and faster to market than others. Their efforts are already delivering dividends. Meanwhile, followers—the 51% of respondents who say their cloud strategies were somewhat effective—trail badly

in the agile areas, while laggards—the 16% of those surveyed who characterize their cloud strategies as not being effective at all—are struggling to realize even the cost benefits of the cloud. **FIGURE 5**

Those respondents in the overall base from Asia were more likely to note cost reduction as a benefit (40%) than those in North America (30%) and Europe (27%).

Kanetkar has seen this in action at Petco. “We have experienced significant business benefits as a result of our move into the cloud in terms of how quickly we can respond to business requirements and provide the power of data to make decisions,” he says. “If we were on-premises, it wouldn’t be possible.” As an example, he cites his team’s introduction of new mobile retail performance dashboards enabling store managers to make operational decisions in real time.

Over the past year, respondents report, the most significant performance improvements have come in the processes associated with new product and service introduction, followed by operational efficiency and revenue growth. Leaders have enjoyed greater gains in these and all other performance measures: 84% of them say they have seen improvements in new products and services, 85% in operational efficiency, and 78% in revenues and growth. A significant number also cited improvement in customer and employee satisfaction as well as customer loyalty and retention. Leaders are also much more likely than other respondents to have seen their revenues grow by more than 30% over the past two years.

There may be many factors behind cloud leaders’ relative success, but their cloud strategy is undoubtedly one of them. “The cause and effect are often iterative,” says Ross. “It’s not just about having the right cloud strategy but also having the right business strategy to take advantage of cloud in a way that drives expanded capabilities.”

Organizations that are embracing the digital opportunities the cloud offers have a higher tech intensity, says Hinchcliffe. “They have a much higher degree of experimentation and are bristling with great pilots and technologies. Cloud allows you to think in a much more on-demand way. You can seize opportunities competitors cannot.”

Accelerating the Way Forward

Seizing opportunities can take various forms when it comes to the cloud, and as organizations over the next several years continue their digital transformation efforts, they may want to focus on some of these lessons learned:

Be clear about your cloud rationale.

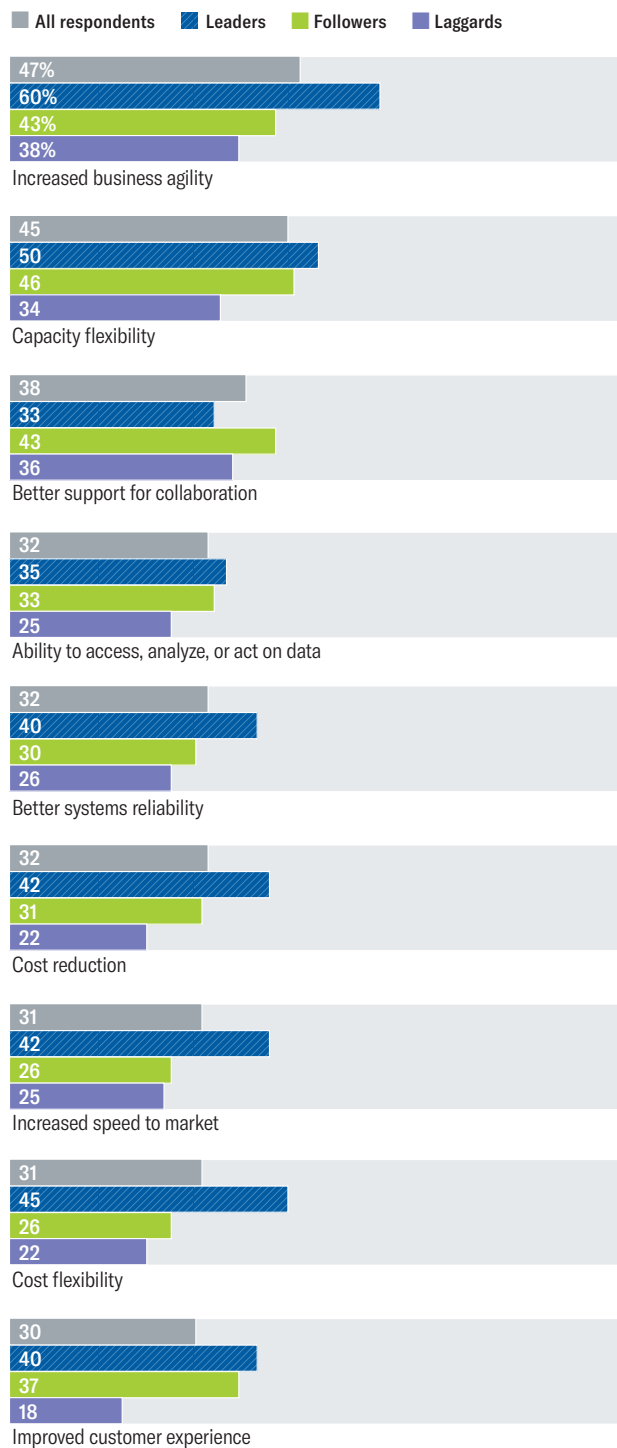
An explicit vision is important. It’s not enough to simply say you want to be more agile. “What advantage are you pursuing? What specific value are you trying to extract? Without that clarity, it’s easy to slip into a ‘boil the ocean’ approach and move everything to the cloud without clear intention,” says

FIGURE 5

The Benefits of an Effective Cloud Strategy

Leaders see more improvements in agility, flexibility, and elsewhere.

In which of the following areas, if any, has your organization seen significant benefits as a result of cloud computing?



Source: Harvard Business Review Analytic Services Survey, February 2020



“You have to be willing to make the long-term commitment to upgrading applications, infrastructure, and teams. Cloud is a differentiating game changer,” says Mike Dosik, director of cloud operations and infrastructure at Jemstep.

Radlick. “That will overwhelm the organization and put even more stress on integration points.”

Pinpoint quick wins.

“You have to identify a particular area of benefit so you can create a clear roadmap of capabilities required,” says Kanetkar. A few successful use cases can garner support and create momentum for further transformation, Radlick adds.

Recognize that there will be some areas where cloud may not add value yet.

“Certain things [tools, skills, processes] don’t translate in the public cloud,” Radlick goes on. “Companies should be aware of that and come up with mitigation strategies to develop a realistic roadmap to the cloud.”

Strengthen the business case.

IT, in partnership with business leaders, should link cloud investments to specific business benefits expected from adoption. “It can be difficult to frame the cloud as what it is: a tool that enables innovation and competitive advantage in nearly unlimited use cases,” says Radlick. “You can’t just say that to a board or leadership team without clear examples. You have to focus on key workloads or proofs of concept that offer tangible examples of the exponential growth opportunities.”

Develop an enterprise cloud strategy.

“Often there are different levels of cloud maturity in an organization itself. Some teams are very advanced, and others are behind,” says Kanetkar. “Make sure you have an overarching strategy so that you can respond to the marketplace quickly. Without that you may not be able to survive. Competitors are moving fast.”

Address data security concerns.

Conduct comprehensive, evidence-based discussions with potential cloud partners, independent or internal experts, and the senior executives involved in decision making. “Security concerns are relevant,” says Joshi, “but they should not block the adoption.”

Plan for pushback.

“Often there are centers of resistance within an organization. A big part of making this transformation successful is having an

operational role and a skills transformation plan to transition to a cloud-centric environment,” Mohan says. “At the end of the day, cloud adoption requires not just technology changes, but also process and skill set changes, to be effective.”

Focus on IT systems environment integration and develop clear plans for hybrid cloud management as part of the evolution toward a fully evaluated cloud operating model.

There needs to be tight integration between internal and external systems, says Joshi. The bulk of IT workloads that have not yet moved to the cloud will not be easy to migrate, he adds. “To leverage cloud for these will be a true test of the enterprise, its commitment, and the capabilities of its service partners.”

There also must be a commitment by management, not just financially but operationally. “It’s important to invest in and effectively manage the resources it takes to begin moving solutions into the cloud,” says Dosik. “You have to be willing to make the long-term commitment to upgrading applications, infrastructure, and teams. Cloud is a differentiating game changer. It comes down to whether organizations are willing to make the investment in it.”

Clearly, business success will increasingly depend on organizations’ ability to invest intelligently in and leverage the right cloud computing strategy in order to enable the technologies that will underpin innovation and competitiveness, such as data and analytics and machine learning. But organizations need leadership committed to seizing the opportunity. “An enterprise can create cloud services to take on the world,” says Hinchcliffe. But that’s not enough, he says, adding that leaders must “look at this opportunity and determine what they can do with this unprecedented power to help their organizations.”

METHODOLOGY AND PARTICIPANT PROFILE

A total of 484 respondents drawn from the HBR audience of readers (magazine/ newsletter readers, customers, HBR.org users) completed the survey.

Size of Organization

32%
10,000 or more
employees

23%
1,000 – 9,999
employees

20%
100 – 999
employees

25%
Fewer than 100
employees

Seniority

31%
Executive
management/
board members

34%
Senior
management

22%
Middle
management

13%
Other grades

Key Industry Sectors

38%
Technology

10%
Consulting

9%
Financial services

All other sectors less
than 8% each

Job Function

17%
IT

13%
Operations/
production
management

11%
General/executive
management

10%
Sales/business
development

8%
Consulting

All other functions
less than 8% each

Regions

37%
North America

31%
Europe

20%
Asia Pacific

6%
Middle East/Africa

7%
Latin America

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



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ANALYTIC SERVICES

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