

CIO AND IT LEADERSHIP SURVEY 2021

## **ACCELERATION**

# HOW DID ORGANISATIONS ACCELERATE THEIR DIGITAL JOURNEYS OVER THE LAST 12 MONTHS, AND HOW CAN THEY KEEP UP MOMENTUM?

The last 12 months highlighted the urgency of prioritising and accelerating programmes that focus directly on increasing revenues, improving customer experience, improving operations or optimising the current cost base – while pausing or stopping others. We review the progress made in 2020 and advise where IT leaders should now be focusing efforts to best drive digital acceleration.



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# EXECUTIVE SUMMARY

Our annual CIO and IT Leadership Survey explores how organisations' priorities have changed in the unique circumstances of the last 12 months. The survey of 138 organisations looks at how IT leaders have had to urgently prioritise and accelerate programmes that focus directly on *increasing revenues, improving customer experience, improving operations or optimising the current cost base.*

The survey revealed that the Covid-19 pandemic unintentionally created the conditions for IT leaders to excel – with 66% of respondents able to secure additional funding for accelerated initiatives and 53% stating that they were able to implement a strategic shift of their entire business operations to digital.

Employees, and the general public, have seen for themselves how IT was able to accelerate certain initiatives, such as mass remote working and new customer channels. However, behind these highly-visible successes lies a more complex story for IT leaders who have had to urgently prioritise programmes that, overnight, were elevated to 'business-critical' (with 69% prioritising End User Solutions), while pausing or stopping other major programmes. Inevitably, 78% reported implementing some 'quick fix' solutions that will need to be addressed.

Now that it has been seen how fast companies can transform digitally when the appropriate level of funding and business support is given, the question as we come out of the pandemic is: how can IT leaders grasp this huge opportunity and keep up the momentum?

As we navigate our way through the challenges of 2021, we strongly recommend organisations use this time to review programmes for the coming years. In particular, focusing on the priorities of Digital Acceleration in **Cloud, Customer Channels, Cost Optimisation** and **EUC**:

1. **Cloud:** Cloud is still a huge focus for IT leaders. We recommend reviewing the flexibility and savings that can be gained over a longer period from implementing cloud solutions.
2. **Customer Channels:** We propose a greater focus on multi-directional and multi-experience customer centric business models due to the step change in consumer behaviour and to address future adverse eventualities.
3. **Cost Optimisation:** IT leaders that conduct a comprehensive review of their running costs, know where savings can be made, look beyond organisational boundaries towards partnerships (to co-innovate and spread the financial risk) will be better able to balance cost and revenue as well as accelerate transformational change.
4. **EUC:** Secure remote access solutions have never been more critical in integrating and connecting an entire workforce remotely and working seamlessly. We recommend the development of a Digital Workplace Strategy that builds on the tactical solutions deployed to more permanent robust end user solutions.

# INTRODUCTION

In the tumultuous last 12 months, IT leaders have had to work closely with the Business to effectively navigate a rapidly changing and uncertain environment. Strategic initiatives have been paused and deploying tactical solutions such as EUC have been prioritised. Maintaining/increasing revenues, customer experience and optimising the cost base have been vital.

The digital maturity (or immaturity) of organisations has been thrown into sharp focus as those that were digitally immature had to scramble to adapt whereas digital first organisations typically fared much better.

Our survey of IT leaders aimed to find out how organisations' priorities changed in the last 12 months, which initiatives were accelerated and what role IT played (or was expected to play) in implementing these changes? We look at the main challenges that were faced by organisations, the subsequent impact and resulting activities. How many of these activities were 'quick fixes' and tactical changes vs permanent strategic change.

The survey also sought to find out where organisations currently sit on their digital transformation journeys and how these goals have changed over the last 12 months.

The report also provides our advice and recommendations on:

1. **How IT leaders can continue to adapt given the increased dependency and visibility of IT**
2. **Which opportunities and challenges to focus on**
3. **How to embed changes and practices long-term**
4. **Preparing for unprecedented events in the future**



*After successfully moving everyone to remote working we now need to accelerate our move to cloud, focusing on data-driven, digital experiences for our clients, colleagues and communities that we can then scale at speed.*

*Nicki Clegg, Chief Technology Officer, Irwin Mitchell*



# FOREWORD

"2020 was a turbulent year in which people's personal and professional lives changed radically. The pandemic put sudden, added pressure on IT leaders to continue delivering on strategic imperatives while, in parallel, focusing on a rapid Covid response; operational continuity, meeting changing consumer demands and managing a remote workforce.

The world entered into the biggest ever home working experiment, with collaboration within and beyond organisations more critical than ever before, putting the role and performance of CIOs and technology functions centre stage. The benefit and criticality of digital workplaces has gained huge momentum and the ability to offer the same, or enhanced, support and customer service while working remotely and securely is now a business must-have, not a staff benefit. In many cases, the experiment has been a great success, resulting in productivity gains and raised motivation and loyalty in a workforce enjoying the benefits of increased flexibility.

Leading through uncertainty can be complex and challenging and IT has really shown its value in driving digital transformation at pace through unprecedented times and now is more than ever expected to influence the strategic agenda.

As we steadfastly move out of these difficult times with cautious optimism, and prepare for a post-Brexit world, we have at least learnt from 2020 that pace of change, if managed well, can be a disruptive benefit. Organisations can be more agile and take greater risk to accelerate initiatives than they previously thought. The key is to ensure that IT's role and contribution remains central to achieving the future transformation agenda."



by **Keith Monk**,  
SVP IT,  
National Grid



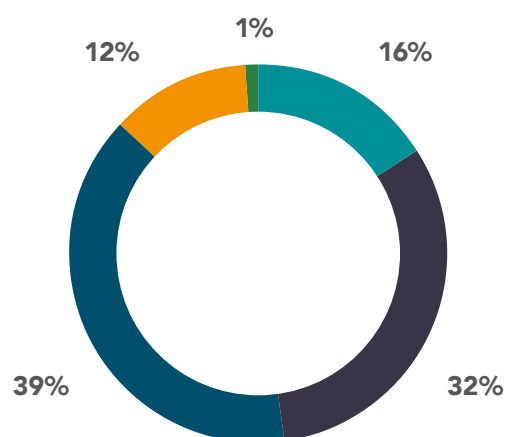
# ADAPTING TO NEW MARKET REALITIES






In 2020, organisations had to tackle an unimaginable situation presented by the pandemic. Over half of the organisations surveyed were still in the early stages of their digital journeys when they had to re-prioritise and pause non-urgent initiatives and focus on operational continuity, with most prioritising EUC, operational stability and cost optimisation.

These organisations will certainly have experienced the most pain with the majority agreeing that this will likely cause high ongoing business impacts, which are likely to include re-scoping, undoing projects, renegotiating and stalling contracts as well as redeploying resources.

Clearly, short term and tactical business decisions had to be made as businesses stepped into survival mode with over three-quarters of respondents implementing 'quick fix' solutions, largely focused on repurposing and stripping down to the bare activities necessary to keep cash flows and profits healthy. The speed at which organisations were forced to adapt meant it was critical for departments to work in partnership in a co-ordinated way to minimise disruption. Underlining this, a large majority of respondents (82%) agreed that Business and IT leadership both improved ways of working.

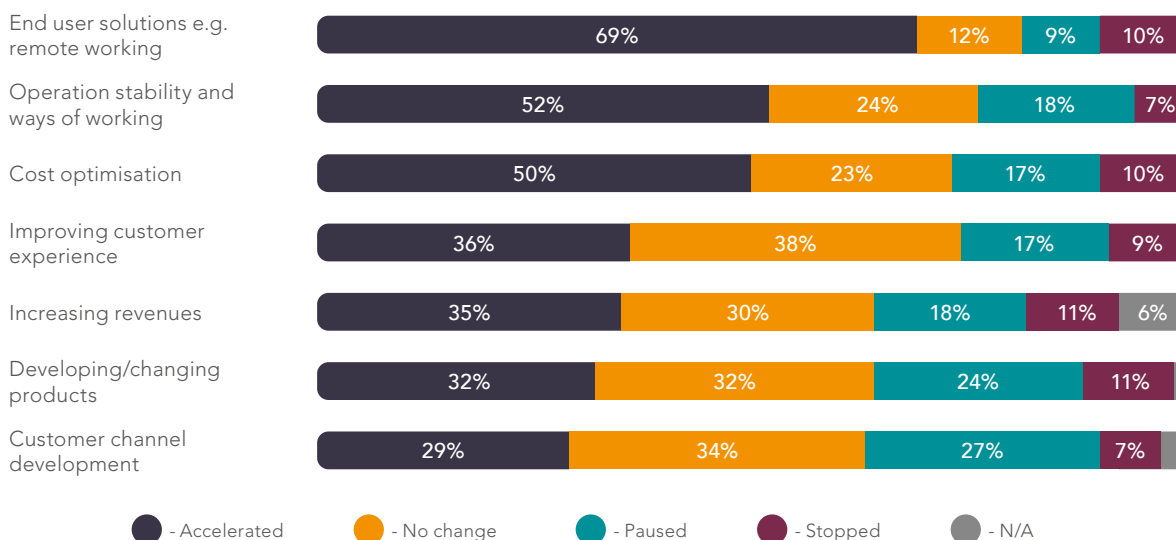
Which statement best reflects the stage your organisation is at in its digital transformation journey overall?



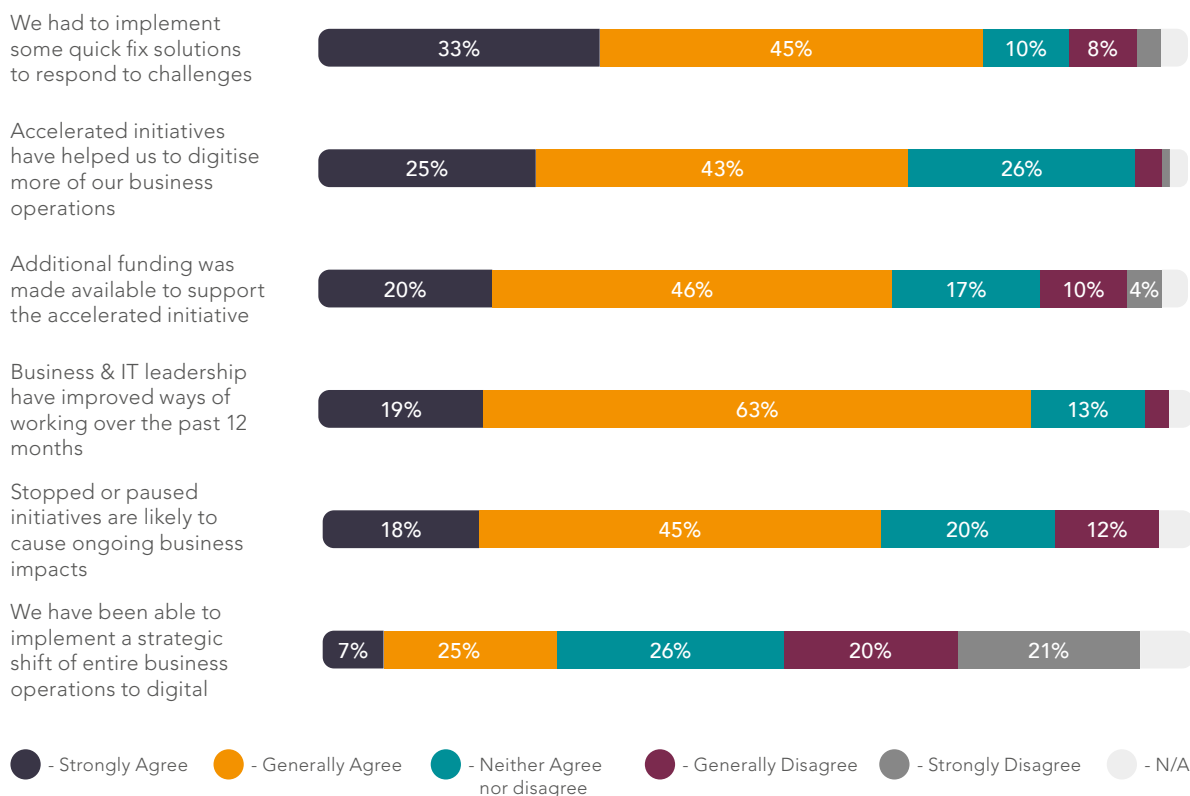
-  We've become a digital-first and technologically mature organisation
-  We're still planning/initiating our digital transformation journey
-  We've largely transitioned to digital ways of working
-  We've yet to seriously consider our digital transformation strategy
-  We're still undertaking the bulk of our digital transformation



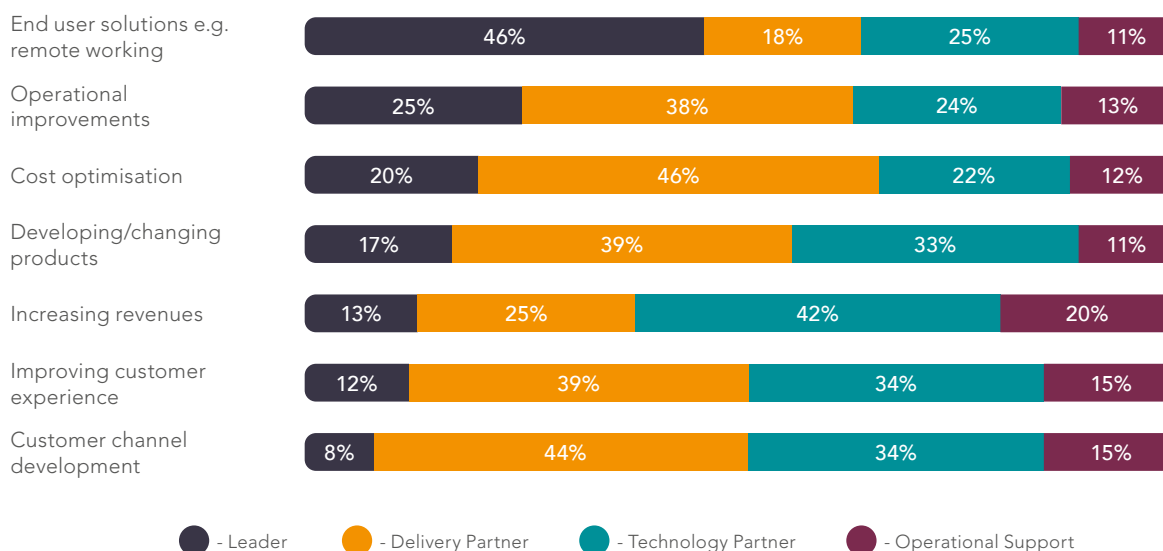
**To what extent has your organisation had to change priorities for the following initiatives over the last 12 months?**



**[Those that have accelerated at least one initiative] To what extent do you agree with the following statements?**



### How involved is your IT team expected to be in delivering the following priorities?



Remarkably, almost three quarters of respondents agreed that acceleration helped them to digitalise more of their operations and over half claimed they were able to implement a strategic shift of their entire business operations to digital. This is a step change for organisations - cutting down their time to market in digitalising the organisation should be seen as a great achievement.

Furthermore, the role and performance of CIOs and IT departments came under the spotlight as

home working became inevitable and customer engagement became an overnight challenge for many.

IT leaders were recognised for playing a critical role in accelerating EUC and improving customer experience as well as increasing revenues and developing or changing products. Organisations that paused or stopped work in these areas were most likely digitally mature or saw these as non-critical investments.



#### COEUS ADVICE

### ORGANISATIONS CAN ADAPT TO NEW MARKET REALITIES IN 2021 AND BEYOND BY:

- Reviewing the tactical solutions to underpin or replace them as needed to meet strategic needs
- Keeping the customer at the heart of the digital strategy - design for multi-channel and multi-experience business models
- Identifying any friction in processes, procedures and policies and adapt these to accommodate new working practices
- Re-evaluating business cases to re-assess benefits and agree which projects are to be restarted, rescope or change direction based on the 'new reality'



*2020 threw us some challenges that didn't divert us from our digital strategy or journey, but forced us to execute parts of it quicker than anticipated. I've been impressed by the willingness of our teams to adopt remote, digital working, but challenges and opportunities still exist to realise the efficiency gains we anticipated. We now need to focus on changing behaviours and mindset towards digital collaboration, information security and ensure that our teams recognise and manage "digital fatigue" by breaking up their day and taking time away from their devices.*

*Andy Pickard, Chief Technology Officer, Hayfin*



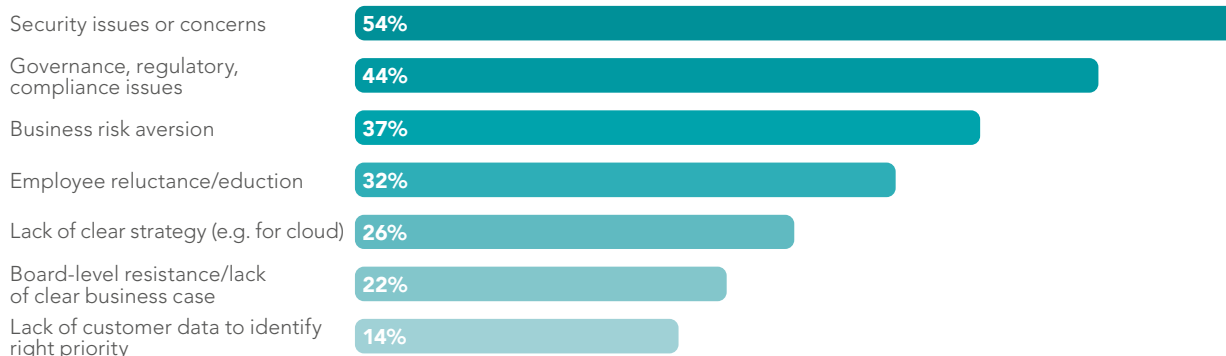
# KEY CHALLENGES IN THE LAST 12 MONTHS

In deploying 'quick-fix' solutions, organisations had to address immediate operational challenges as well as more strategic ones across three main categories:

1. Agreeing the priority changes
2. Implementing the solution
3. Post implementation

## What are the key challenges that your organisation has faced over the past 12 months?

### Part 1: Agreeing the priority changes

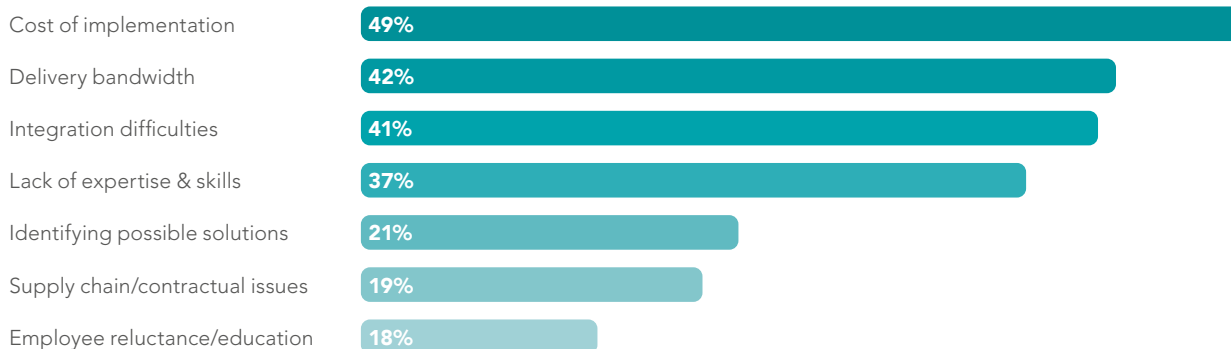


Perhaps unsurprisingly, security was a key challenge for over half of the respondents (given the shift to digital exposed businesses to greater cyber-threats), followed by governance constraints and business risk aversion. The difficulty of making strategic decisions was perhaps exacerbated by the rapid timescales needed, balancing risk with maintaining operational continuity.

There is no denying organisations that had a clear digital strategy, especially around cloud and digital channels, will have fared better in agreeing the priorities. It seems as though a large percentage of respondents had this in place but despite this, gathering support from board members and employees was still an issue.

## Implementation and post implementation challenges

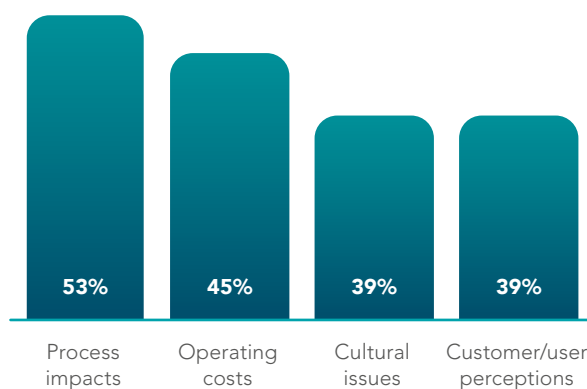
### Part 2: Implementing the solution



Moving to new ways of working clearly brought implementation cost challenges which was the biggest hurdle for almost half of respondents, closely followed by delivery bandwidth, integration difficulties and lack of skills. This is probably to be expected but does demonstrate the lack of technology flexibility that seems to have created problems for a significant proportion of organisations.

Given the speed with which organisations have had to adapt, the process and cost issues post implementation are perhaps unsurprising. It is difficult to imagine a change as rapid and fundamental as this having no cultural issues or problems with user perception - 39% is possibly high given the number of organisations that had already made a significant shift to remote working and digital services. This is perhaps showing more around the communications and employee or customer engagement than the change in technology.

### Part 3: Post implementation



**On a scale from one (no impact) to ten (major challenge), which factors have challenged your organisation when it comes to enabling mass remote working over the last 12 months?**

**Part 1: Infrastructure preparedness**



**Part 2: Ways of working**



There is no doubt that very few organisations were ready to scale an entire workforce from an office to remote working. The survey highlights this with a fairly even spread across all organisations, with Data/Security, EUC and connectivity/collaboration tools as the key challenging factors.

Bottlenecks in addressing company culture, processes and policy and a reliance on supplier performance were all factors in delivering a smooth move to remote working. The extra layers of security

hardware, connection quality and access to the necessary applications and data further increased the implementation complexity.

As we move out of the pandemic, organisations will be reflecting on how well they were resourced and skilled in delivering these shifts urgently and at scale. Lessons learnt will create changes in the way IT operates, but one thing is certain: IT's importance in enabling a more permanent shift in working culture and consumer behaviour has been made clear.



**COEUS ADVICE**

**WE RECOMMEND ORGANISATIONS CONSIDER:**

- Closely examining their E2E internal processes, procedures, tools and culture and start to identify the changes that will be required to enable a fully flexible and agile workforce for the future
- Developing a People, Tooling & Communications Strategy that will build on the tactical solutions and enable a more co-ordinated and planned effort to deploying EUC and a new working culture
- Reviewing and aligning security policy and governance frameworks to enable a more flexible, secure and resilient remote working environment



## SPOTLIGHT DRIVING ACCELERATION THROUGH A PARTNERSHIP MODEL

Given some of the internal technology, policy and process challenges that organisations faced, many organisations, notably, in the retail and pharmaceutical industries, looked beyond their organisational boundaries to form partnerships to accelerate their time to market and meet the consumer spike in demand. For example, in the global pharmaceutical industry partnerships were formed to accelerate vaccine development, production and delivery. This enabled both process and technical capabilities to be expedited for COVID research in particular clinical operations, patient recruitment and digital platforms to enable electronic data capture and analysis.

Through a partnership model resources, knowledge and skills were pooled to fulfil a common purpose and shared vision astonishingly bringing a vaccine to market in under 12 months which in the conventional model would take 5-10 years. The Pharma sector has traditionally lagged behind other sectors in digital transformation,

focusing on scientific research rather than operational improvements or new business models.

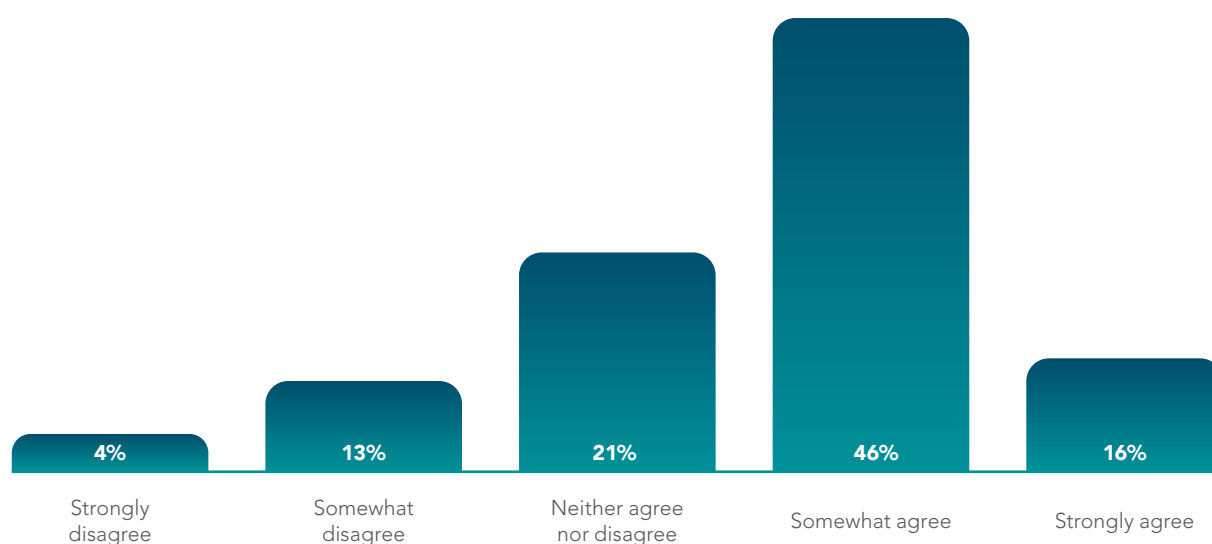
However, the pandemic has shone a spotlight on the criticality of a partnership model to expedite time to market, to share greater risk and to expand the possibilities of what can be achieved. Similarly, in retail, partnerships with third party delivery companies also accelerated the ability to make larger fulfilments in line with increased demand.

This clearly demonstrates there are new business models to be explored, and the pandemic has forced, as well as proven, that organisations can work in new and creative ways. Conventional business models are dying fast, and we will see a rise in partnerships and platform-based ecosystems where networks of interdependent organisations and partnerships rely on each other for success.

# ACCELERATING BEYOND THE IMMEDIATE FUTURE

To what extent do you agree or disagree with the following statement?

"The only technology programmes that now get funding at our organisation are those that directly accelerate revenues, improve the customer experience, improve operations or reduce the current cost base."



**The focus of 2020 was about where to focus resources in response to COVID-19, and given we are still here, operational stability will remain a priority in 2021 with a long-term view to post pandemic growth.**

For the majority of organisations surveyed, projects in EUC, operational stability and cost optimisation were accelerated but mature organisations reduced activities in these areas where their existing capability was sufficient and so further enhancement work was paused or stopped. It is likely that these efforts will restart with a view to improving remote capabilities such as live collaboration and social interaction. Improving services such as these will be key to retaining many of the benefits of increased remote working without impacting workplace capabilities and culture.

The speed at which key remote working and operational stability capabilities had to be rolled out meant that inevitably some corners were cut. In our experience, these cuts were often around integration, security and architecture standards compliance. The great news is that the vast majority of these changes and new implementations were successful and as a result IT has been seen in a far more positive light.

As the situation evolves and we start to understand our way out of the pandemic, these changes need to be risk assessed to understand what risk has been accepted. It needs to be agreed whether this risk is acceptable on a long-term basis or needs to be consolidated and addressed (possibly delivering further functionality or enhancements in the process). This could be a challenge, as stakeholders can often overlook the fact that current fixes could be a mixture of temporary services and work-arounds

and focus only on the end result. Assigning budget to address these could also be a challenge, when they are seen to be working and budget is being requested for other customer-facing and revenue generating initiatives. IT departments will need to clearly articulate the risk of turning temporary fixes into permanent services to justify budgets.

A great example of opportunities for acceleration is around retail: traditional sales models are hugely challenged due to the pandemic (and also due to Brexit) as customer attitudes and expectations have changed. Projects that capitalise on changes in attitudes to online interactions and services that successfully blend online and in-person interactions

to provide end user improvements are likely to be key. We expect many organisations to start accelerating activities in customer channel and product development and consider how they can future proof customer interactions.

It is also possible that acceleration could slow down in many less critical areas post-pandemic, so organisations have an opportunity to capture the learning from both the fast implementation and from the enforced remote ways of working to capitalise on efficiency and capability improvements.



#### COEUS ADVICE

### WE RECOMMEND ORGANISATIONS CONDUCT A STRATEGIC PORTFOLIO REVIEW TO:

- Ensure that all changes made in response to the pandemic are assessed to identify any tactical risks accepted and create a plan to mitigate, update or accept all of them
- Review all projects that were paused at the start of the pandemic to agree their relevance. Given the changes in consumer and employee attitudes there may be opportunities to rescope, cancel or accelerate some projects in order to focus on newer objectives
- Assess the people and financial resources as these may have changed due to the pandemic
- Ensure that effective Business Demand Management processes are in place and robust. This is essential to ensure companies have the capability to reassess their technology priorities in line with business demand, changes to resources and new opportunities. A robust demand management process will help ensure that organisations have not missed an opportunity in the melee of activity to assure operational continuity

# IT BUDGETS



**We ask IT leaders about their budgets every year to gain an understanding of how IT spending is changing over time.**

The similarity between last year's expectations and this year's is perhaps reflective of the pandemic and the focus this has brought to the criticality of IT, as well as continued concerns about the impact of Brexit. Many of our clients have reflected recently about the praise they have received from business colleagues about the COVID response and about how the same colleagues are now much better at asking for IT to be involved in business planning discussions.

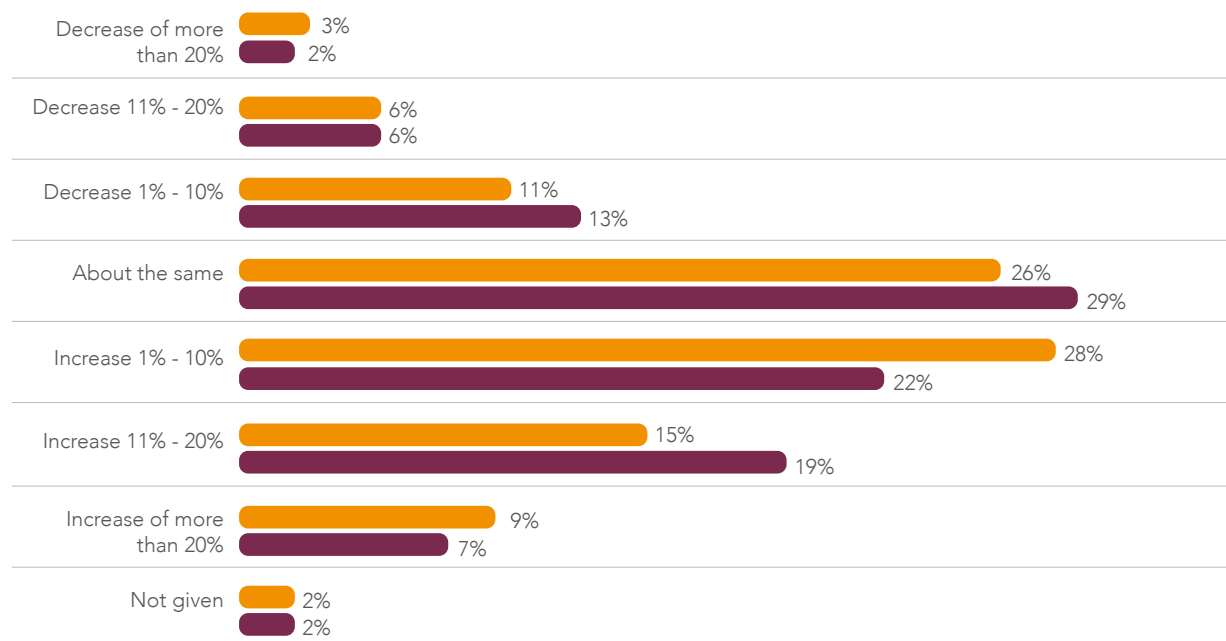
The IT budget expectations seem to show that, far from having budgets cut (as may have been imagined), IT leaders across all sectors are expecting their budgets to remain untouched, or to increase, in order to build on these improved relationships and in recognition that technology is critical in all sectors and should be funded accordingly.

Over the longer term there is a clear upward trend in expectations, with organisations now much more likely to expect a year-on-year IT budget increase.

### What is your organisation's IT budget?



### How is your IT budget changing?



Changes to my IT budget last year



Changes to my IT budget this year

# LOOKING AHEAD: LEADERSHIP IN THE NEW NORMAL



IT leaders and their teams have had a great opportunity to show their value in responding to the pandemic. This increased visibility of business dependence on technology can be used to drive the strategic agenda in 2021 and beyond, demonstrating that IT does not just deliver solutions for the business but can also lead business transformation.

Over half of respondents are still on a journey to be digitally mature, while those that are mature will still need to keep up with emerging trends and keep a close eye on costs. While many believe that digital is still the answer, IT leaders need to work with the business to establish the specific questions and drive the right technology solutions to achieve business goals.

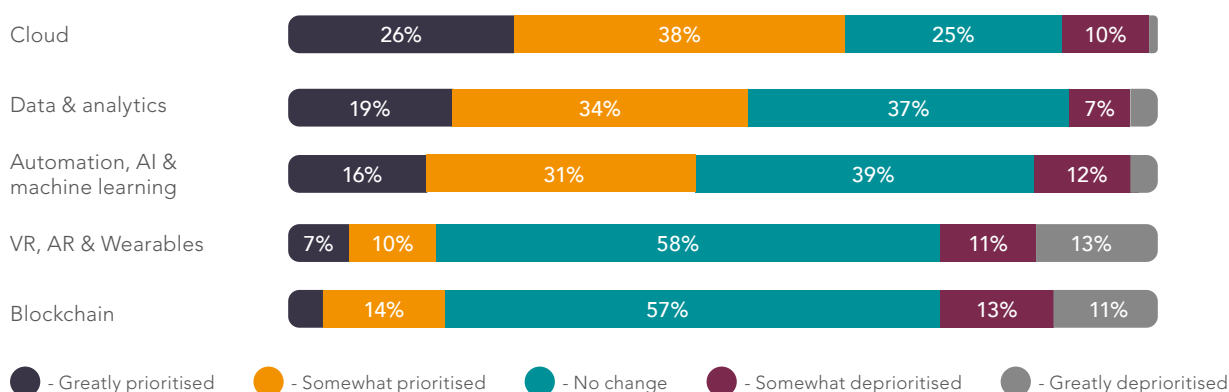
With Brexit finally completed and with some idea on a timeframe for the end of the pandemic, we predict that the focus of digital acceleration in 2021 will be as follows:

**Cloud:** The fact that nearly two thirds of respondents stated cloud has been prioritised shows moving to the cloud is still a huge focus for IT leaders. For many larger, established companies this still remains a challenge, while new start up and disruptive companies are naturally using public cloud solutions to maximise speed to market and optimise the cost base.

While complex, especially when there is a larger legacy estate, we recommend that IT leaders review the flexibility, efficiencies and carbon savings that can be gained over the long-term from implementing cloud solutions.

**Customer Channels and Data:** We envisage a greater focus on multi-directional and multi-experience customer-centric business models, supported by customer data, to prepare for future eventualities and changes in consumer behaviour.

### How have your plans or usage of the following technologies changed over the past 12 months?



Given the potential of online service capabilities to reach customers in new and different ways and to provide enhanced services, organisations can look to acquire as well as retain customers. Through the right customer engagement strategies, partnerships and investments in technology such as CRM and CX, IT can help the business to accelerate revenues through customer experience improvements.

These strategies must balance remote connectivity, new and existing channels and self-service (e.g. chatbots), while recognising not all users are ready to move completely online.

**Cost Optimisation / Accelerate Revenue:** Ensuring that budgets are being used for innovation rather than 'keeping the lights on' means that IT leaders who have a comprehensive view of their running costs and know where savings can be made, working with business colleagues that focus on partnerships to co-innovate and spread the financial risk will be better able to balance cost and revenue as well as accelerate transformational change.

While Agile and DevOps are becoming more common, many business leaders are still not comfortable with the MVP and 'fail fast' approaches that support increased innovation, speed to market and technology flexibility.

IT leaders now have an opportunity to champion the benefit of MVP solutions as both achievable and beneficial. Additionally, agile ways of working will also require shared delivery accountability and flexibility from suppliers, which in turn will require more disruptive IT sourcing strategies.

**End User Solutions:** Working from home is no longer a nice-to-have but a necessity for most (originally) office-based employees. Indeed, many organisations are finding that traditionally office-based functions such as operations are now more efficient. Continuing to evolve remote working capability whilst addressing 'quick fixes' made in 2020 and delivering enhanced user experiences will be a priority in 2021 and beyond.

IT leaders can work in partnership with business colleagues to ensure that organisations have a clear Digital Workplace Strategy that effectively combines remote and office working. This will require robust identity management and security policies as well as developing new principles around ways of working. IT teams will need to help drive this strategy and work with their suppliers to define, design and implement suitable infrastructure that can be scaled on demand with simple, automated, tools and processes.

# ABOUT THE SURVEY

This report was informed by a survey of 138 senior IT leaders in October / November 2020, with key roles including CTO, CIO, COO, Director or Head of: IT; IT Transformation; IT Operations; Applications; Technology Services Strategy; Digital; Technology Services; Infrastructure; Architecture; and other senior managers. Roles were in organisations operating across major verticals, such as manufacturing, engineering and construction; technology, media and communications; financial services; consumer products and retail; energy and utilities; and pharmaceuticals and healthcare.

## THE AUTHORS

### Ben Barry



Ben is a founder of Coeus Consulting and business and IT transformation professional with over 20 years' experience in consulting and management roles. Previously he was Director, CIO Advisory at KPMG, and has also held roles at Xantus Consulting

and Capgemini. He has coached and led senior clients on strategy development through to transformation and benefits delivery.

### Simon Reynolds



Simon is a senior transformation leader who has a strong track record of managing multi-million pound transformation programmes at large Energy & Utilities organisations, helping them balance the challenges of legacy IT and embrace digital technology

and transition. Simon lead the International Project of the Year (GSA Awards, 2018), a Network and Communications Sourcing programme that delivered c. €80M in savings for a major Energy client. He was also shortlisted for 'Team Leader of the Year' (MCA Awards, 2019).

### Bhavika Depala



Bhavika is an experienced management professional with 15 years' experience supporting various clients in business architecture, strategy and transformation. She helps businesses unlock value and advises on complex architecture and business

transformation initiatives. She has 'hands on' experience across the lifecycle from Strategy to Execution working at CxO level and with global cross-functional teams. Recent achievements include developing the business technology vision and driving process and legacy systems transformation for a household logistics client delivering benefits worth c.£4m and establishing a new Enterprise Architecture capability for a global transport company.

### Keith Thomas



Keith is an experienced Enterprise Architect and IT Strategy advisor who advises on digital engagement of customers and employees; the humanisation of IT, AI and Service Management. Keith develops and supports the implementation of business-led strategies in areas such

as Digital Transformation, application strategy, SIAM, IT infrastructure, CRM and Enterprise applications. One of his recent Local Government programmes was shortlisted for the MCA 'Change in the Public Sector Award' 2020.

# ABOUT COEUS CONSULTING

Coeus Consulting is an independent, award-winning IT advisory that stands alongside technology, business and procurement leaders to deliver strategic change.

We do this by standing alongside our clients to create, execute or manage tailored and strategic change, and drawing upon our truly independent and unique experience to exceed expectations. Founded in 2013, we have offices in the UK and Germany.

## Our Capabilities

Our capabilities are the application of rich and deep expertise to the three phases of the project life cycle (Strategy, Execution, and Optimisation). Based on the unique requirements of individual client engagements, we combine these capabilities to create highly tailored services.

CAPABILITIES	STRATEGY	EXECUTION	OPTIMISATION
Operating model	Develop tailored IT operating model and organisational structures	Support the implementation of new operating models	Review of operating model against industry leading practises
Data & Analytics	Develop strategies to drive maximum business value from data	Lead or support data & analytics programmes and/or functions	Data audit and assessments, to support continuous improvement activity
Sourcing	Sourcing strategy to support the build vs. buy decisions	Management of competitive tender process and contract negotiations	Vendor and contract management and health checks and optimization
Commercial management	TCO review, cost optimisation strategy and commercial leading practise	Implementation of commercial strategy, governance and measures	Maturity assessment, supplier governance and consideration
Business Architecture	Define and align the Enterprise Business Model and strategy to drive end-to-end business value	Turning strategy into viable operational results	Measuring end-to-end business performance to drive cost and revenue benefits
Technology & architecture	Enterprise architecture and technology adoption strategies	Executions of complex programmes of technology transition and change	Maximise the value clients can draw from their technology investments
Change delivery	Programme and portfolio design and governance	Management or recovery of complex change programmes and projects	Audit and health-check assessments
Services integration & operational excellence	Service strategies, design and transition strategy for future mode of operation	Implement service delivery operating model, tools and processes	Performance maturity assessments
Mergers, acquisitions & divestments	IT due diligence and merger or divestment planning	Execution of integration or divestment plan	IT effectiveness and transformation assessments

## GETTING IN TOUCH

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