



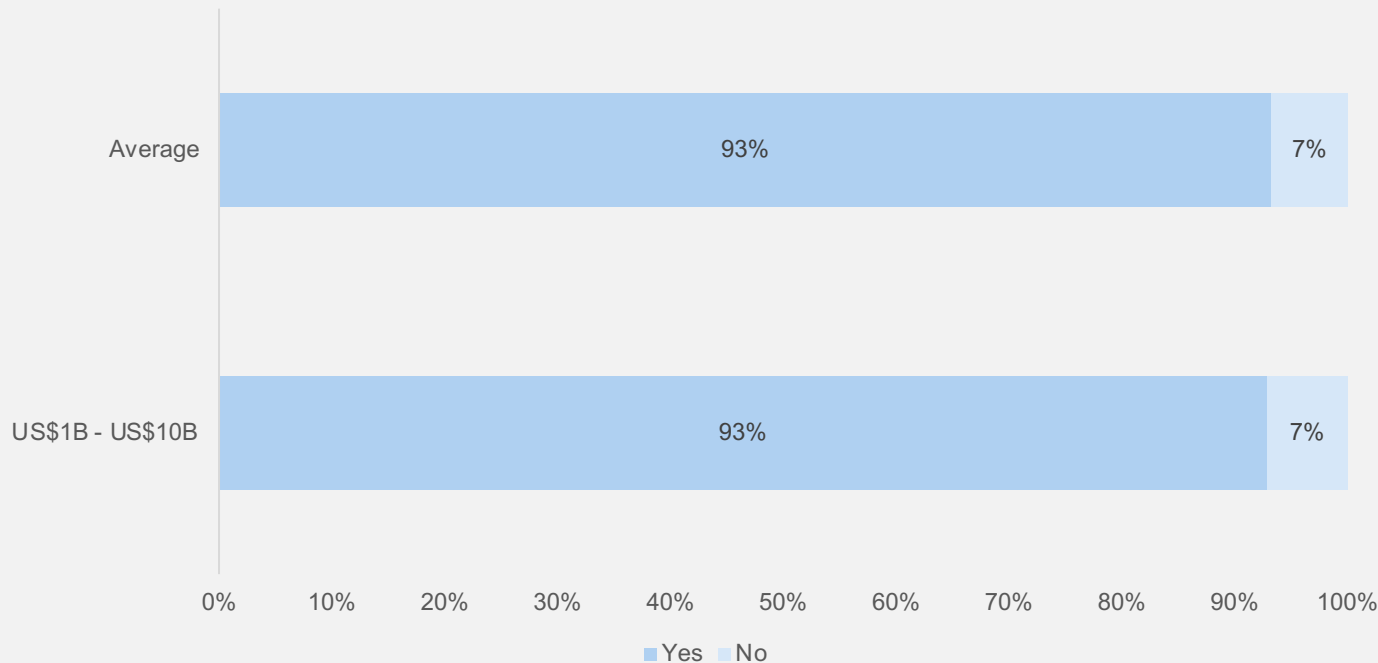
Untethered World

Leading in a Time of Chaos

Viewpoints From Member
Companies With US\$1-10
Billion Revenues

Expanding Scope of Non-Traditional Business

Are non-traditional business issues (i.e., social and political issues) a more significant part of business decisions now than they were three years ago?

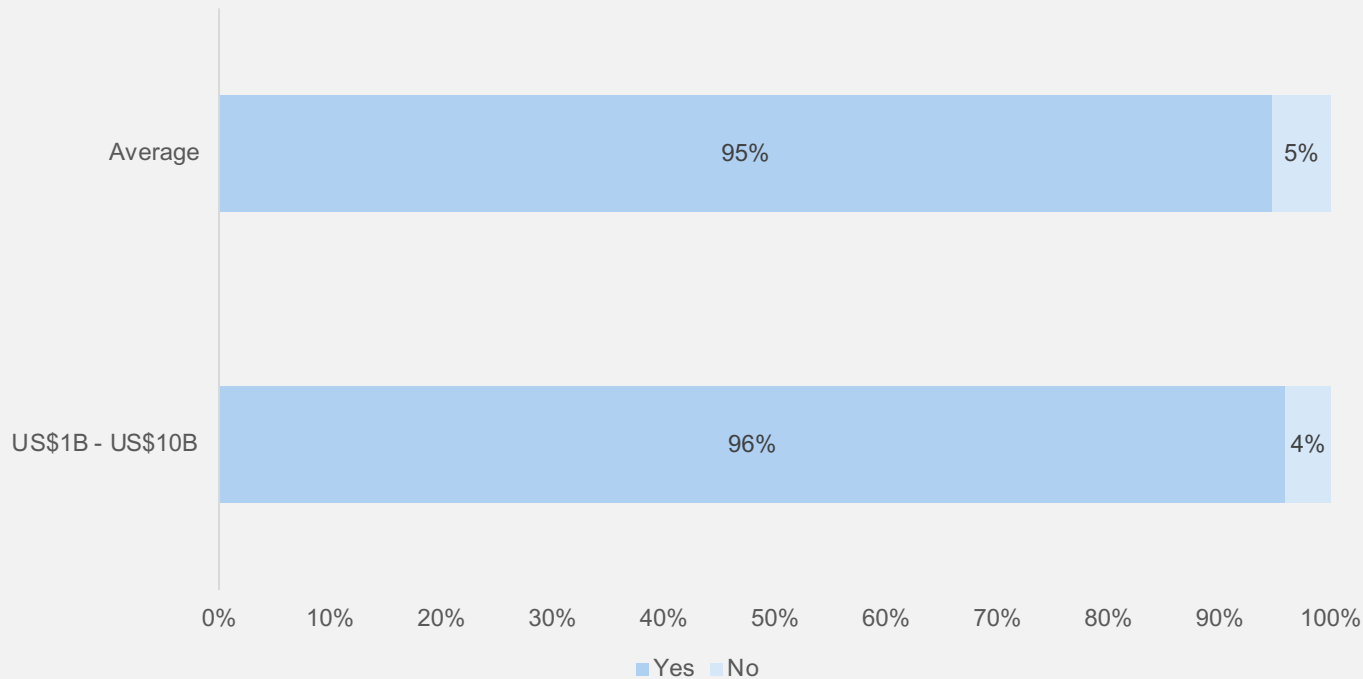


93% of respondents from organizations with revenues between US\$1 billion and US\$10 billion indicated that non-traditional concerns, such as social issues, are a more significant part of business decisions than they were three years ago. This is equal to the overall average sample.

n=209

Increased Pressure to Take a Stance

Are leaders under increased pressure to lead on social and political issues than they were three years ago?

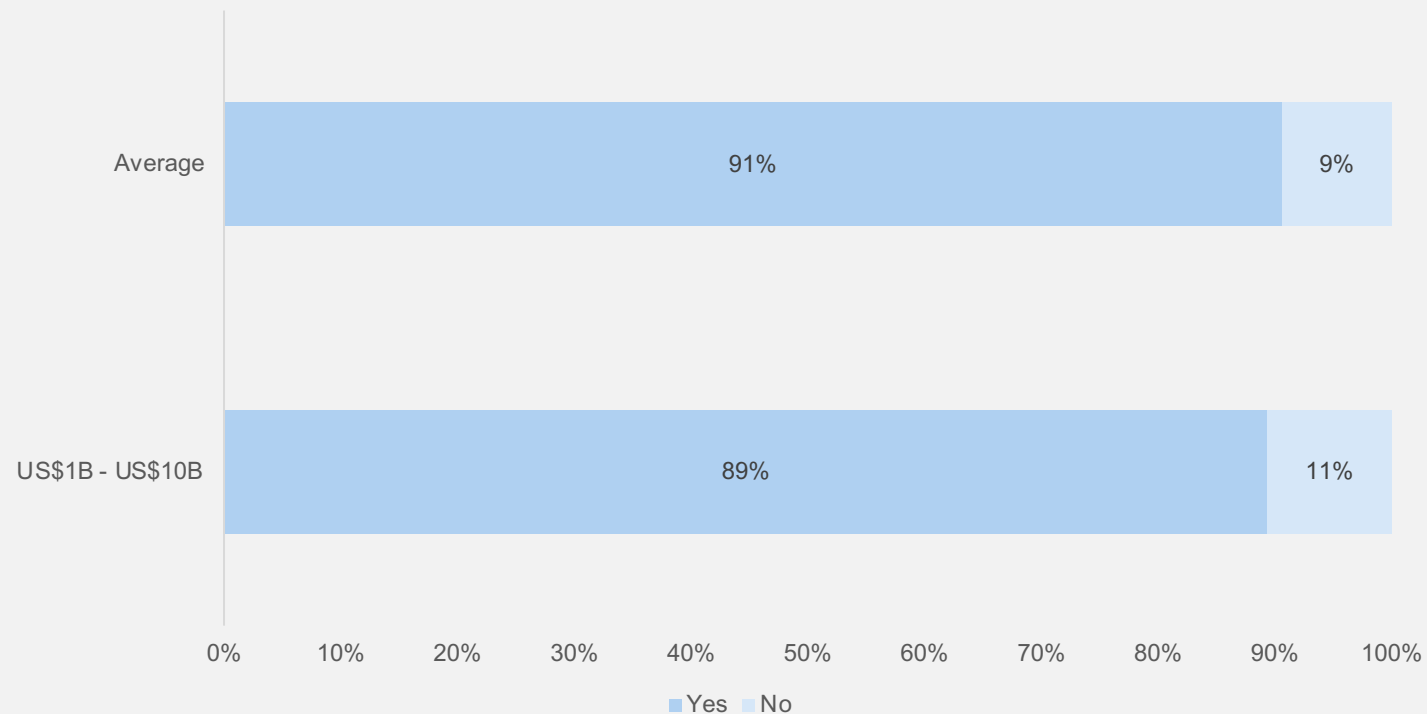


96% of respondents from organizations with revenues between US\$1 billion and US\$10 billion said leaders are under increased pressure to take a stance on social and political issues, compared to three years ago.

n=209

More Stakeholders to Manage

Are leaders managing a wider range of stakeholders than they were three years ago?



89% of respondents from organizations with revenues between US\$1 billion and US\$10 billion indicated leaders must now manage a wider range of stakeholders than three years ago. This compares to an average figure of 91%.

n=203

Employee Reactions Are Key for Revenue Leaders Making Complex Decisions

Please rank the following considerations influencing leaders when making complex decisions today.

US\$1-10 Billion Organizations

Considerations	Rank
Employee reaction	1
Consumer reaction	2
Brand image	3
Board expectations	4
Shareholder reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

n=190

Average

Considerations	Rank
Employee reaction	1
Brand image	2
Consumer reaction	3
Board expectations	4
Shareholder reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

Respondents from organizations with revenues between US\$1 billion and US\$10 billion indicate that employee reactions are the most important consideration, with consumer reactions following in second.

Brand Image Was Most Critical Three Years Ago; Employee Reaction Ranked Fifth

Please rank the following considerations influencing leaders when making complex decisions today compared with three years ago.*

Today

Considerations	Rank
Employee reaction	1
Consumer reaction	2
Brand image	3
Board expectations	4
Shareholder reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

Three years ago

Considerations	Rank
Brand image	1
Board expectations	2
Consumer reaction	3
Shareholder reaction	4
Employee reaction	5
Investor sentiments	6
Public opinion	7
Supplier relationships	8

Respondents from organizations with revenues between US\$1 billion and US\$10 billion indicated that, three years ago, leaders were most influenced by brand image when making complex decisions. Employee reaction ranked only fifth three years ago but is number one today.

n=180

*Note that executives were asked to rank their own perspectives as they believed they would have ranked them three years ago. This survey was not conducted three years ago.

Employee Turnover Is Critical for Revenue Leaders

Rank the impact of the following risks of failing to appropriately respond to a major external crisis.

US\$1-10 Billion Organizations

Average

Risks	Rank
Employee turnover	1
Consumer backlash	2
Stakeholder discontent	3
Regulatory action	4
Investor abandonment	5
Backlash from business community	6
Supplier disaffection	7
Other	8

Risks	Rank
Employee turnover	1
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Other	8

Organizations with revenues between US\$1 billion and US\$10 billion rank employee turnover as the most pressing risk, but place stakeholder discontent above regulatory action relative to the survey average.

n=195

The Most Important Stakeholders: Employees

Please rank the following stakeholders in order of how important they are in shaping your decision-making

US\$1-10 Billion Organizations

Stakeholders	Rank
Employees	1
Consumers	2
Internal executive leadership	3
Institutional investors	4
Regulators	5
Suppliers	6
Local communities	7=
Individual investors	7=
Business peer groups	9
Online influencers	10
Other	11

n=204

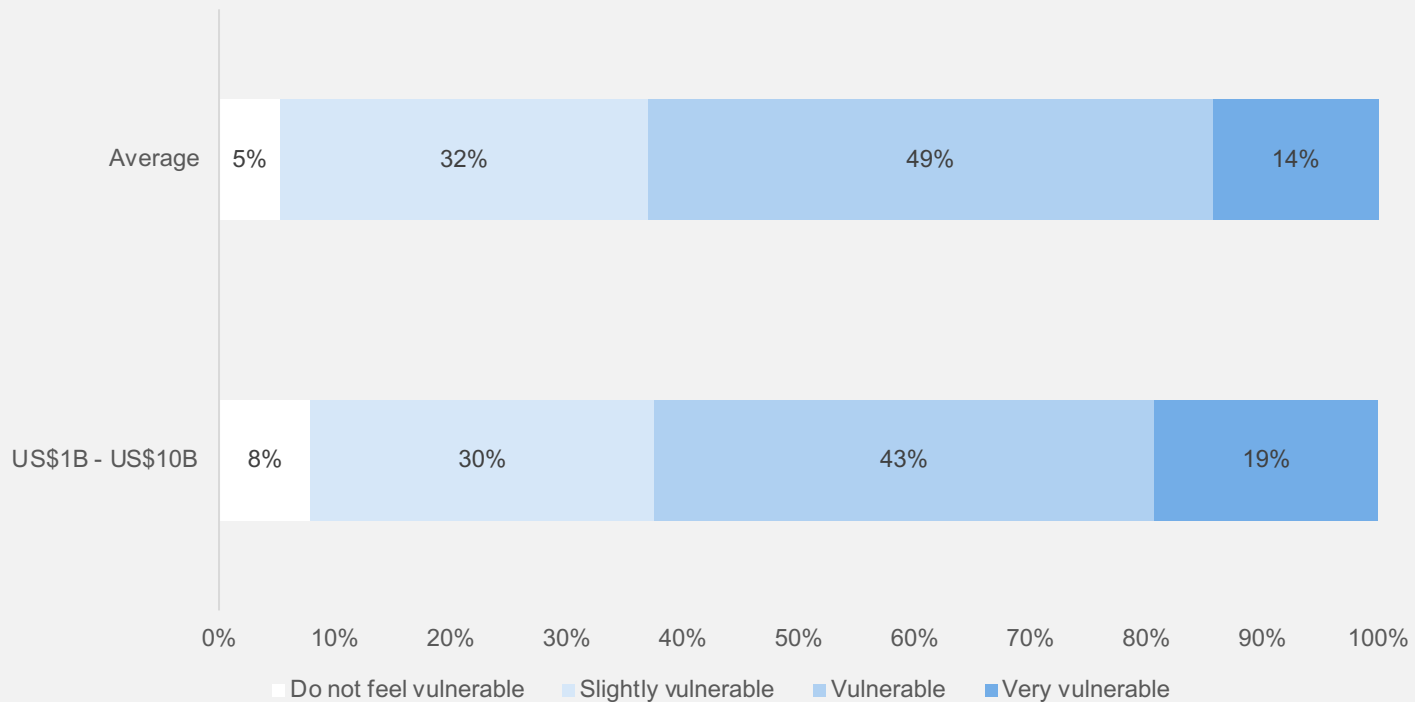
Average

Stakeholders	Rank
Consumers	1
Employees	2
Internal executive leadership	3
Institutional investors	4
Regulators	5
Suppliers	6
Local communities	7
Individual investors	8=
Business peer groups	8=
Online influencers	10
Other	11

Respondents from organizations with revenues between US\$1 billion and US\$10 billion ranked employees first in terms of their importance in shaping decisions. When examining the overall sample, employees fall to second place behind consumers.

Leaders More Likely to Feel “Very Vulnerable”

How vulnerable do leaders feel when making a complex decision regarding a major external crisis?



19% of respondents from organizations with revenues between US\$1 billion and US\$10 billion said leaders feel “very vulnerable” when making complex decisions about external crises. This compares to an average figure of 14%.

n=189

Adaptability Is the Top Skill Needed Today

Please rank the following skills or capabilities leaders need in the current environment.

US\$1-10 Billion Organizations

Skills/capabilities	Rank
Adaptability	1
Resilience	2
Vision	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

Average

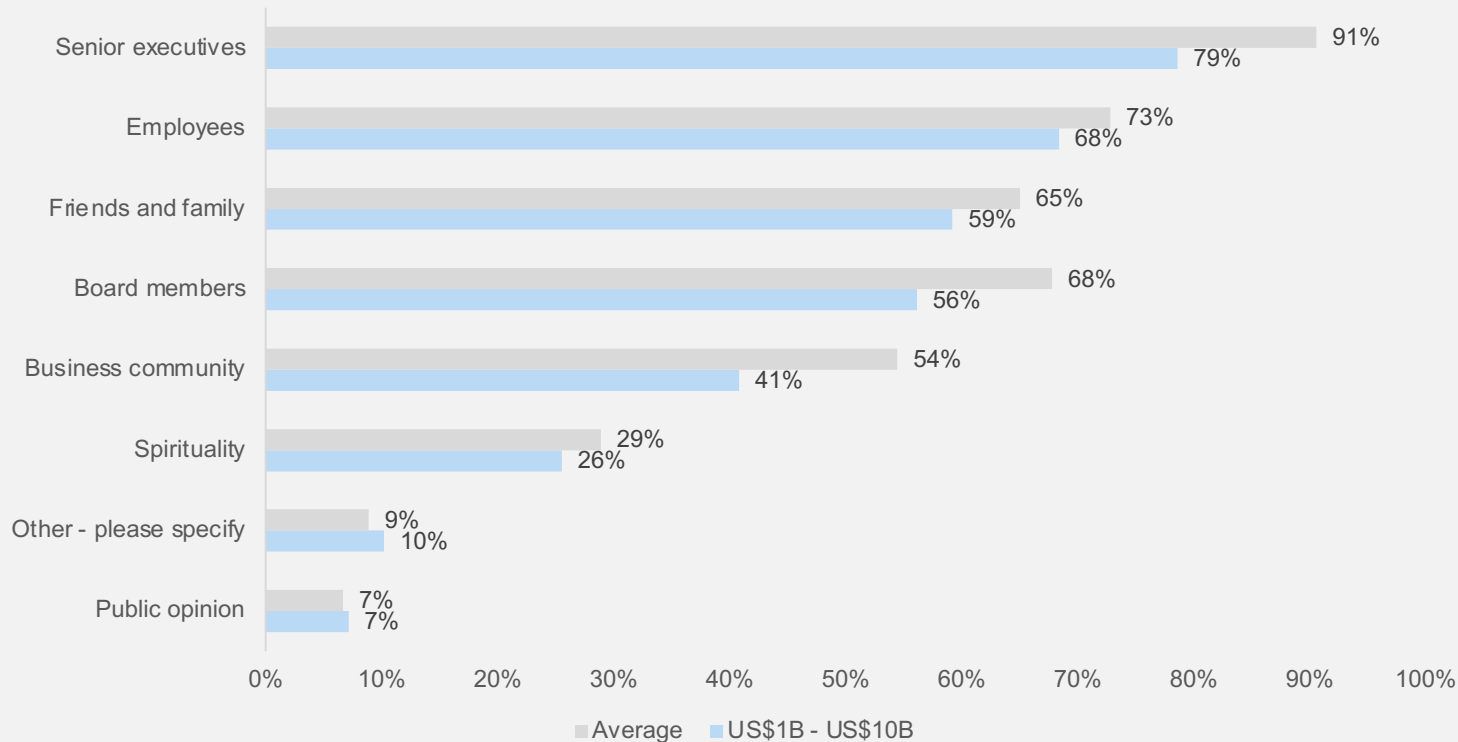
Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

Respondents from organizations with revenues between US\$1 billion and US\$10 billion ranked adaptability as the No. 1 skill needed of leaders in the current environment, as did respondents from across the overall sample.

n=181

Leaders Look to Senior Executives for Support

When making complex decisions, where do leaders get support or draw strength from?



79% of respondents from organizations with revenues between US\$1 billion and US\$10 billion said leaders seek support from their fellow senior executives, compared to an average figure of 92%—making senior executives the most popular source of support and strength across both groups.

n=180