



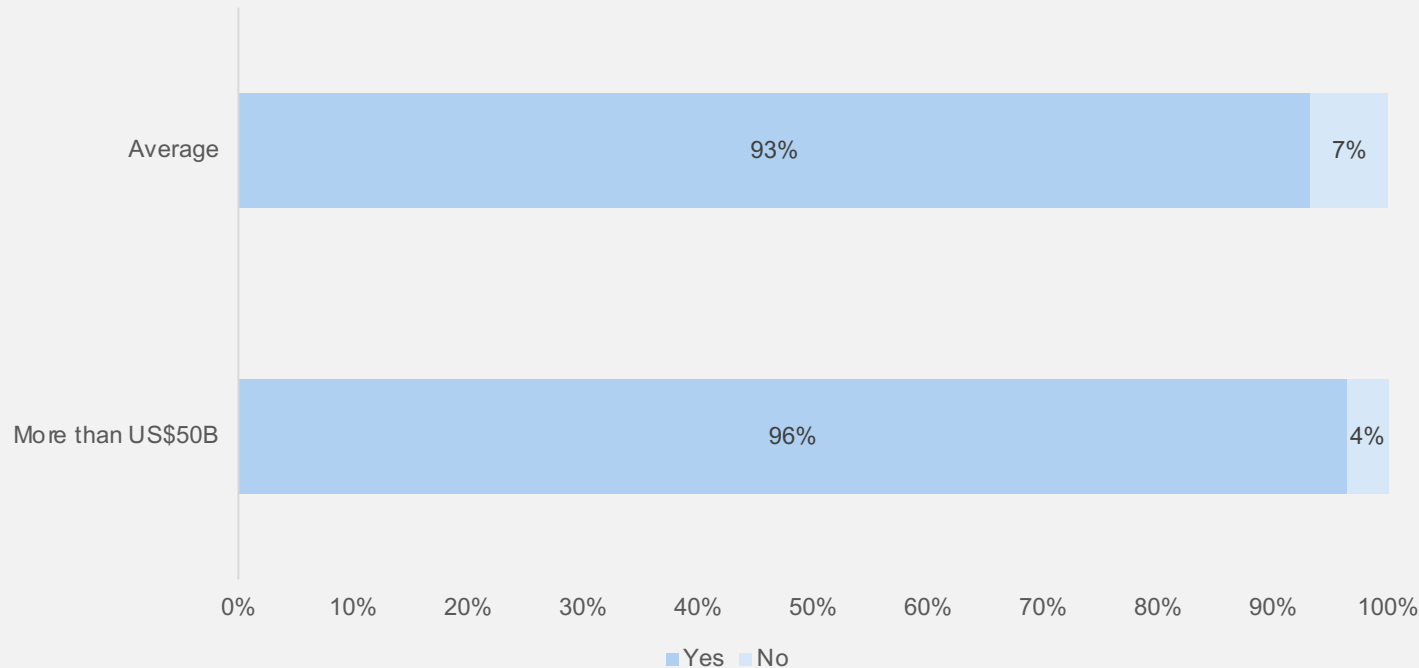
Untethered World

Leading in a Time of Chaos

Viewpoints From Member
Companies With More Than
US\$50 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?

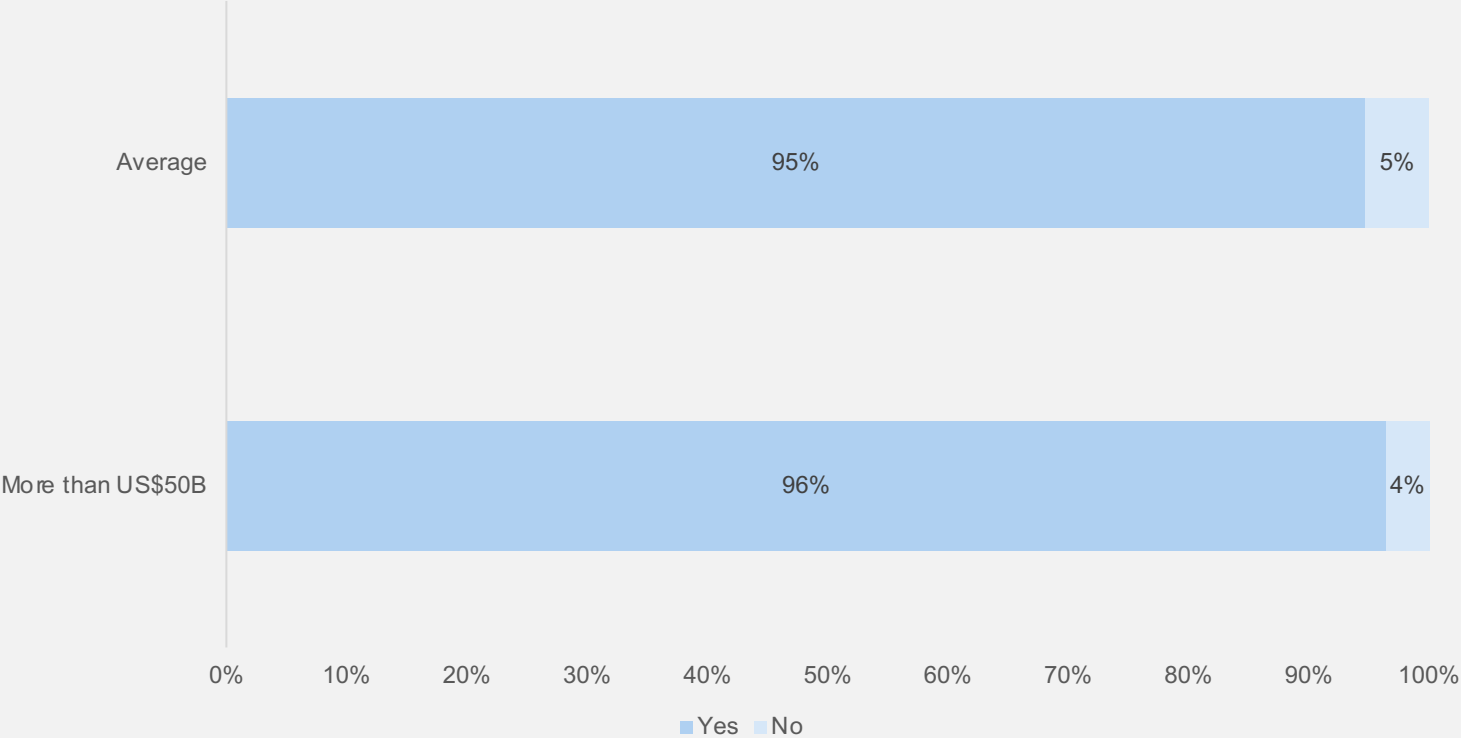


96% of respondents from organizations with revenues of more than US\$50 billion said non-traditional business issues, such as social and political issues, play a more significant role in decision-making than they did three years ago. This compares to an average figure of 93%.

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?

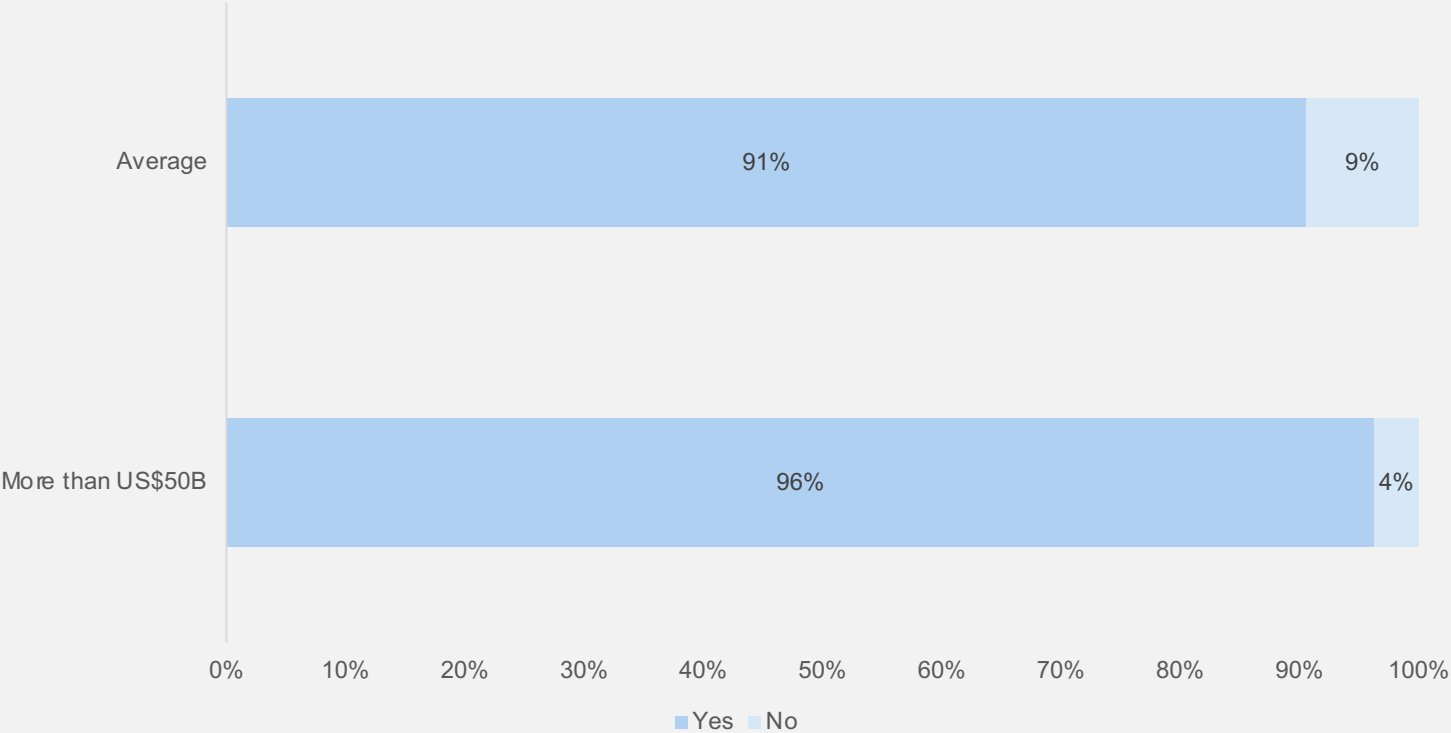


96% of respondents from organizations with revenues of more than US\$50 billion said leaders faced increased pressure to lead on social and political issues today, compared to three years ago.

n=209

More Stakeholders to Manage

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



96% of respondents from organizations with revenues of more than US\$50 billion said leaders must manage a wider range of stakeholders today, compared to an average figure of 91%.

n=203

Large Organizations Prioritize Brand Image

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

Organizations With More Than US\$50 Billion

Considerations	Rank
Brand image	1
Consumer reaction	2
Board expectations	3
Investor sentiments	4
Employee reaction	5
Shareholder reaction	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 in excess of US\$50 billion ranked brand image first and employee reactions fifth, a major difference from the average sample, which ranked employee reaction first.

Boards Were Also a Top Priority Three Years Ago

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

Today

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

n=180

Three years ago

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

Respondents from organizations with revenues in excess of US\$50 billion indicated board expectations were the greatest influence on leaders' decision-making three years ago, as did respondents from the overall sample. Brand image appears to have become more important to respondents in this revenue bracket, as evidenced by its jump from fourth to first over the past three years.

Consumer Backlash Is the Greatest Risk

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

Organizations With More Than US\$50 Billion

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

Average

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

On average, overall respondents ranked employee turnover as the top risk of failing to respond appropriately to a major crisis. Those from organizations with revenues in excess of US\$50 billion ranked consumer backlash first.

n=195

Consumers and Executives Have the Most Impact on Decision-Making

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

Organizations With More Than US\$50 Billion

Stakeholders	Rank
Consumers	1
Internal executive leadership	2
Employees	3
Regulators	4
Institutional investors	5
Suppliers	6
Business peer groups	7
Local communities	8
Individual investors	9
Online influencers	10
Other	11

n=204

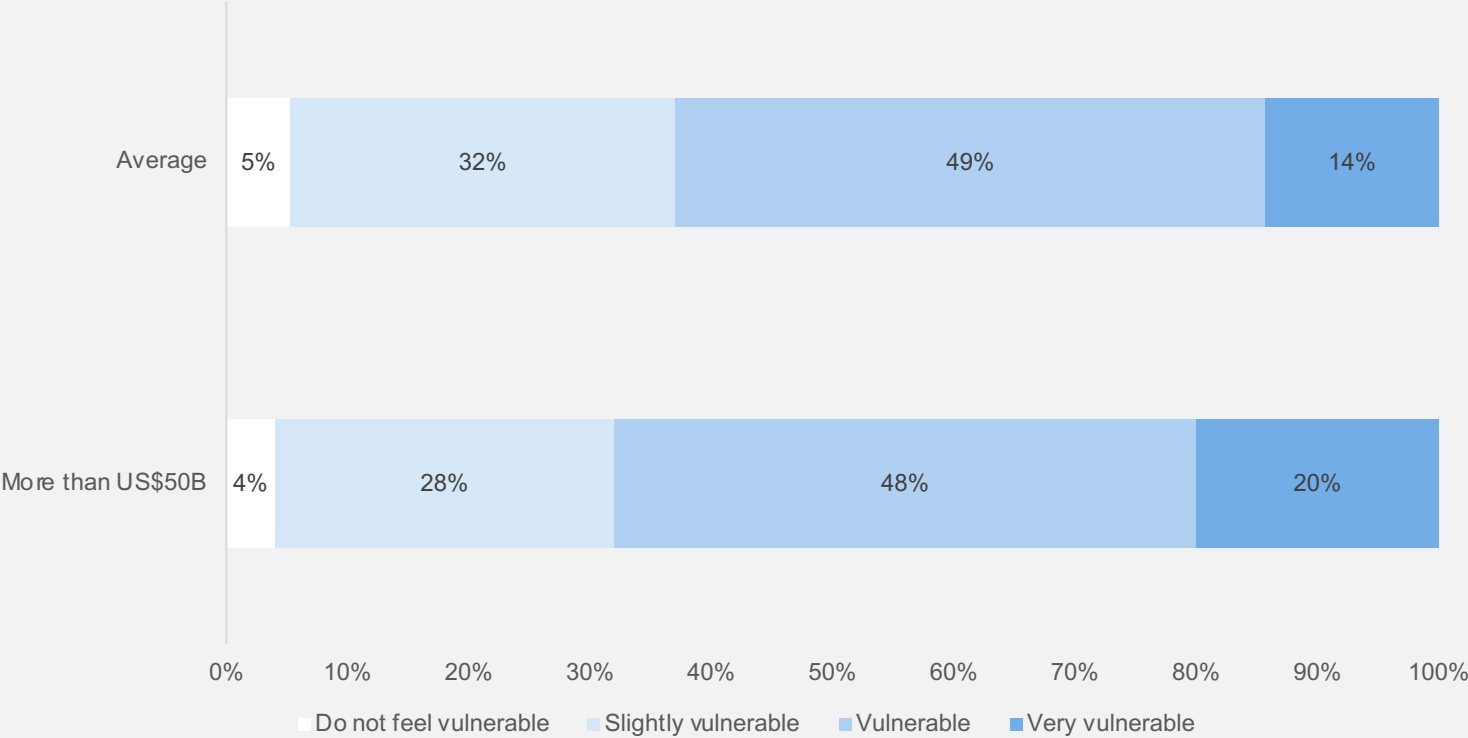
Average

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

Deviating from the average sample, respondents from organizations with revenues of more than US\$50 billion placed higher priority on internal executive leadership teams than employees when making decisions.

Many Leaders of Large Companies Feel Vulnerable Making Complex Decisions

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



20% of respondents from organizations with revenues of more than US\$50 billion said they felt “very vulnerable” when making complex decisions regarding major crises, compared to an average figure of 14%.

n=189

Vision, Not Adaptability, Is the Top Skill Needed

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

Organizations With More Than US\$50 Billion

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

Average

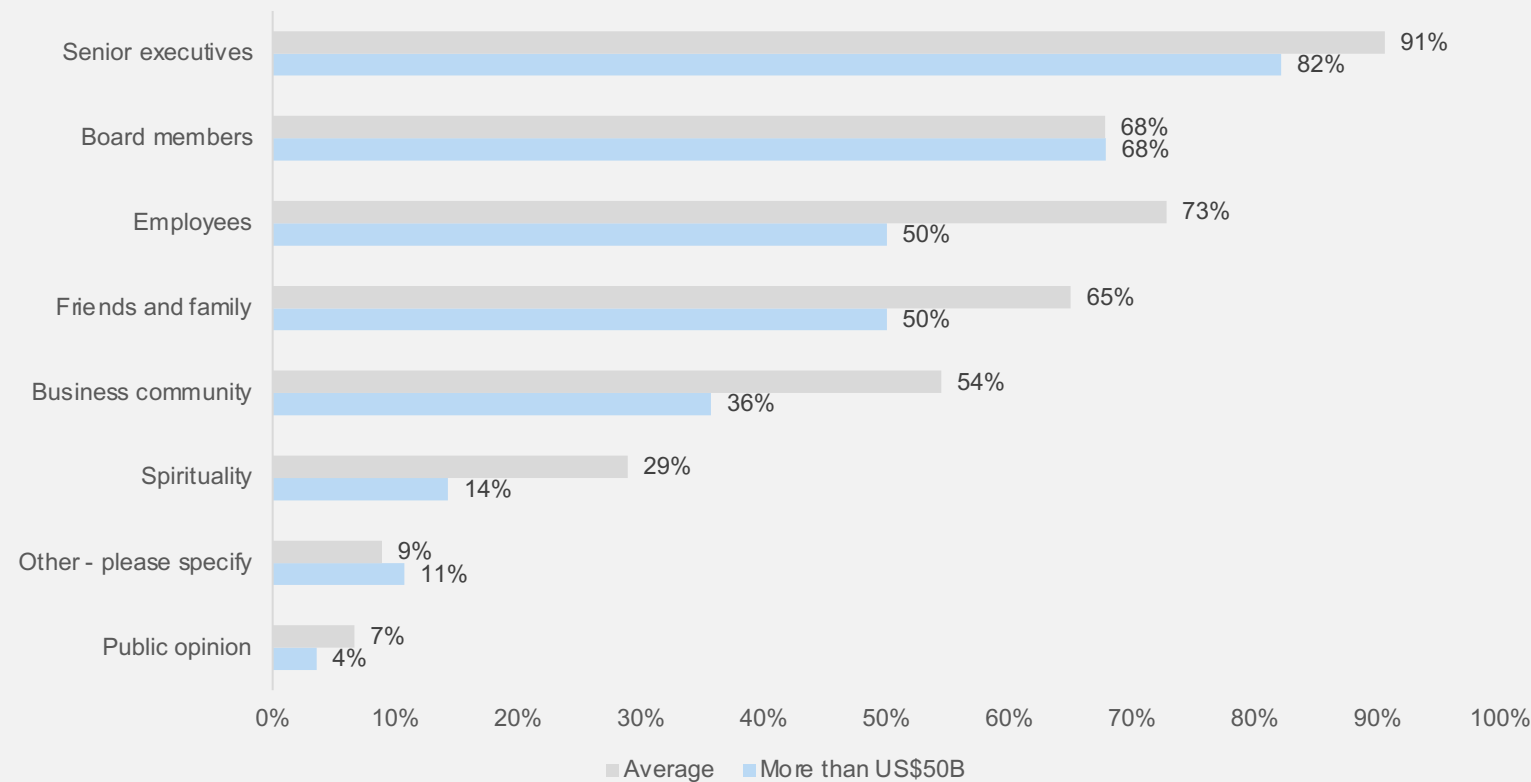
Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

Leaders from organizations with revenues in excess of US\$50 billion ranked vision as the most important skill needed to navigate the current environment. The sample average ranked adaptability first.

n=181

Leaders of Large Companies Less Likely to Lean on Employees for Support

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



50% of respondents from organizations with revenues of more than US\$50 billion indicated they rely on employees for support and strength, compared to an average figure of 73%.

n=180