



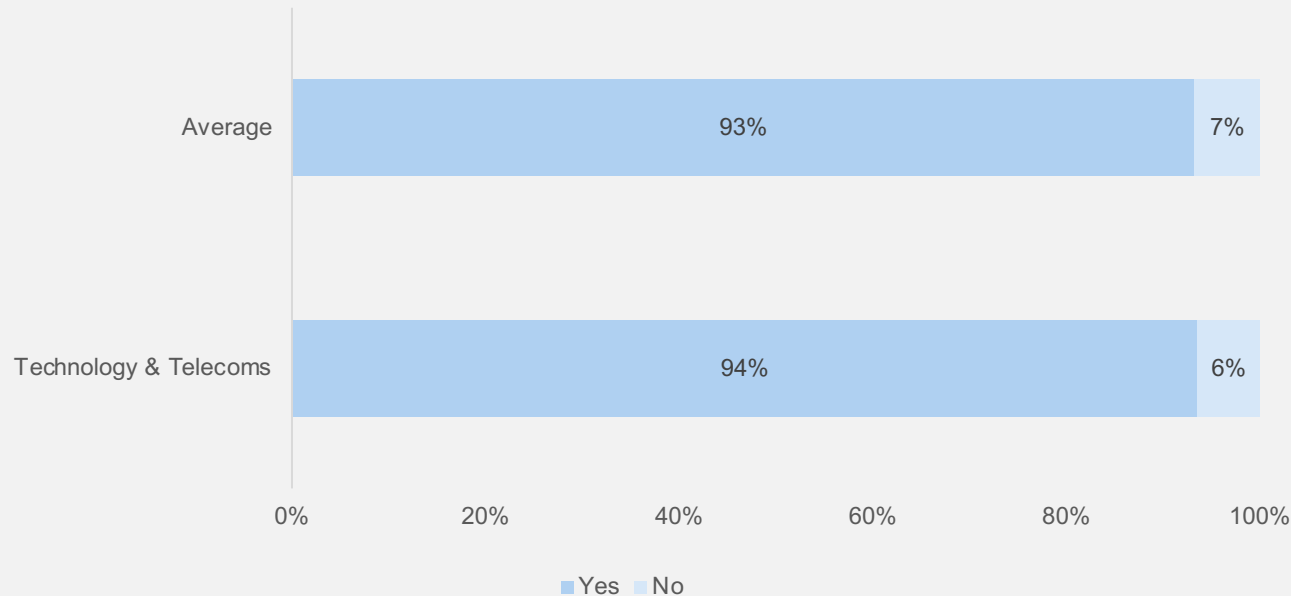
Untethered World

Leading in a Time of Chaos

Technology and
Telecommunications
Viewpoint

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?

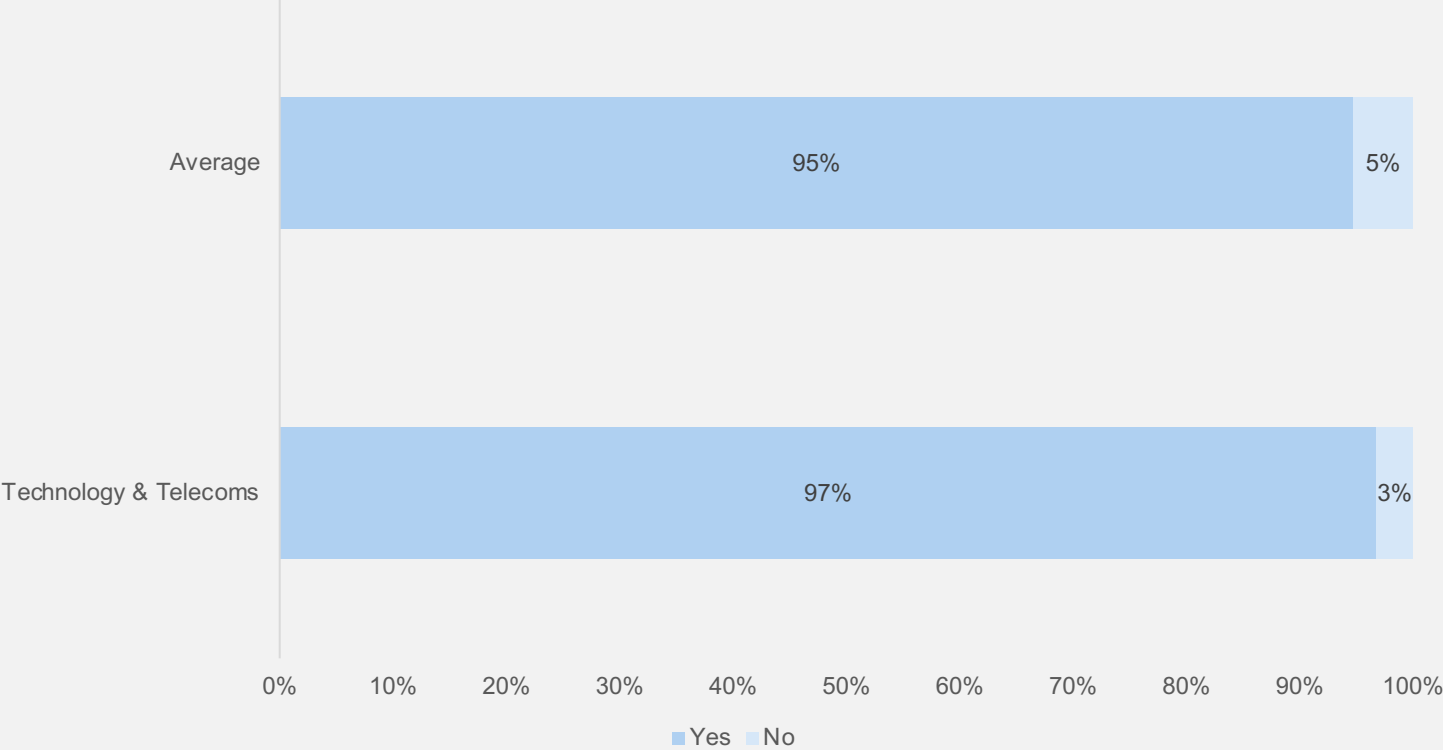


94% of respondents from technology and telecommunications industries indicated that non-traditional concerns, such as social and political issues, play a more significant role in decision-making than they did three years ago. This compares to 93% of the overall sample of respondents.

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?

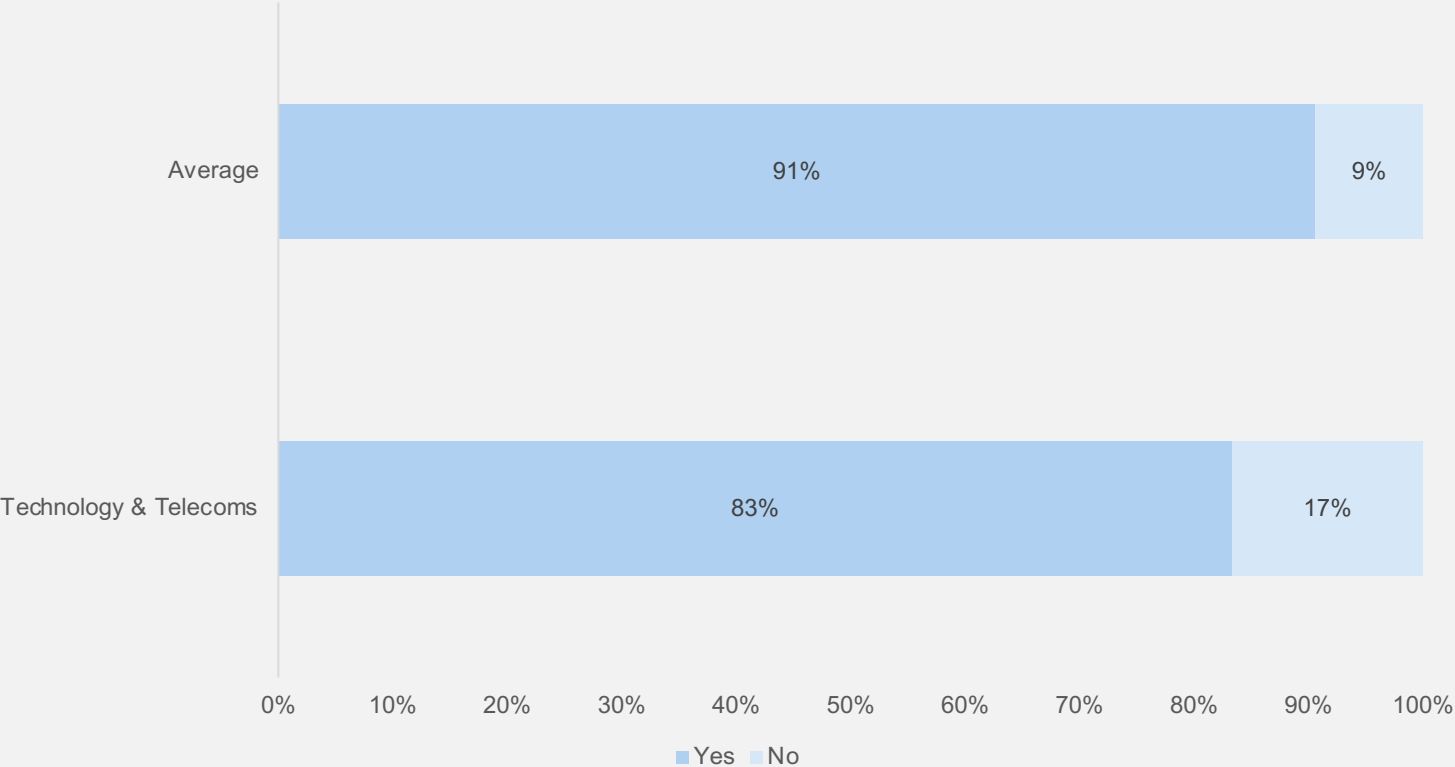


Compared to 95% of overall respondents, 97% of respondents from organizations within the tech and telecommunications industries said leaders are under increased pressure to take a stance on social and political issues, compared to three years ago.

n=209

More Stakeholders to Manage

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



83% of respondents from organizations in the tech and telecommunications industries indicated leaders must now manage a wider range of stakeholders than three years ago. This compares to an average figure of 91%.

n=203

Consumer Reaction Critical for Tech Leaders

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

Technology and Telecommunications

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

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

Tech and telecommunications industry organizations ranked consumer reaction first, compared to the sample average, which ranked employee reaction first. Investor sentiment is also ranked higher when compared to the sample average.

n=190

Investor Sentiment Ranked First Three Years Ago

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

Today

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

n=180

Three years ago

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

Three years ago, investor sentiment trumped board expectations as the most influential factor in decision-making within the surveyed tech and telecommunications organizations.

*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: The Greatest Risk

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

Technology and Telecommunications

Risks	Rank
Employee turnover	1
Consumer backlash	2
Investor abandonment	3=
Stakeholder discontent	3=
Regulatory action	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

Organizations in the tech and telecommunications industries say the highest risk of not appropriately responding to an external crisis is employee turnover. Investor abandonment was ranked third, unlike the sample average, in which regulatory action ranks third.

n=195

Employees: The Most Important Stakeholders

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

Technology and Telecommunications

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

Average

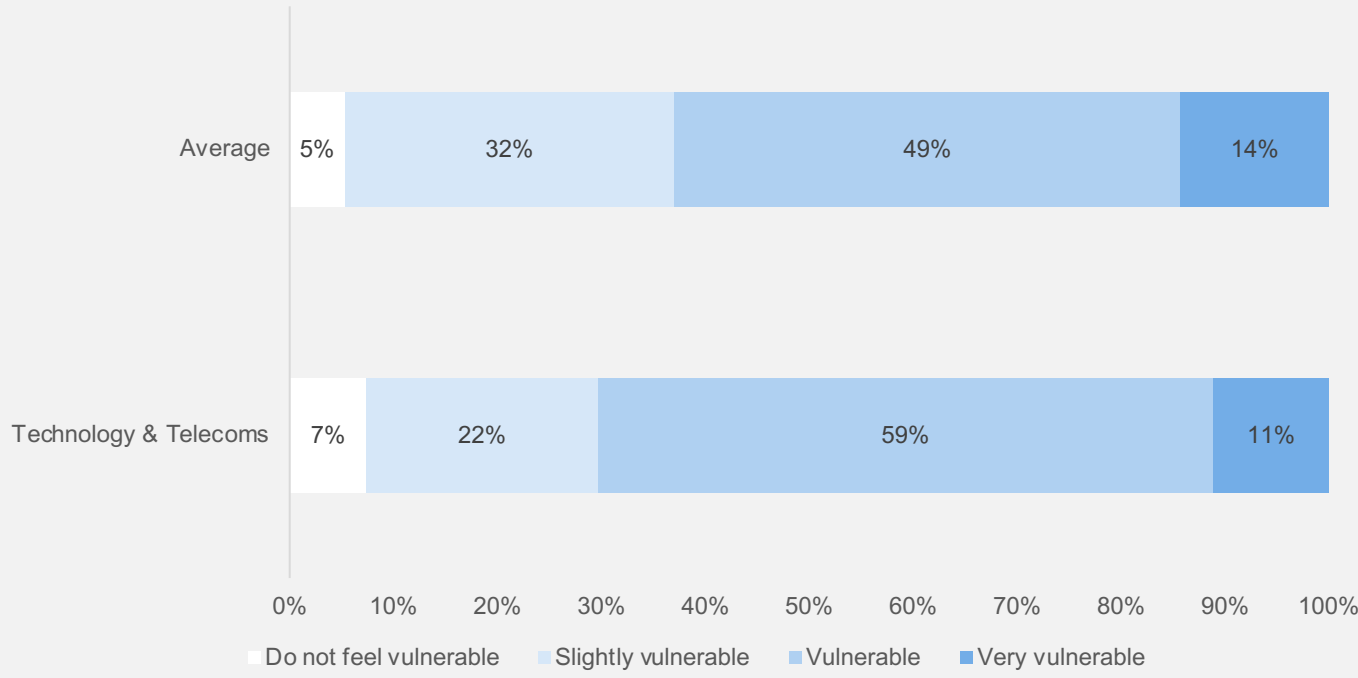
Stakeholders	Rank
Consumers	1
Employees	2
Internal executive leadership	3
Institutional investors	4
Regulators	5
Suppliers	6
Local communities	7
Individual investors	8=
Business peer groups	8=
Online influencers	10
Other	11

Respondents from the tech and telecommunications industries assign employees top rank in terms of the importance of various stakeholders in shaping decisions. Consumers ranked first in the sample average.

n=204

More Vulnerability in Tech and Telecommunications

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



59% of respondents from organizations in the tech and telecommunications industries said leaders feel “vulnerable” when making complex decisions about external crises. This compares to an average figure of 48%.

n=189

Empathy Is in Demand

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

Technology and Telecommunications

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

Average

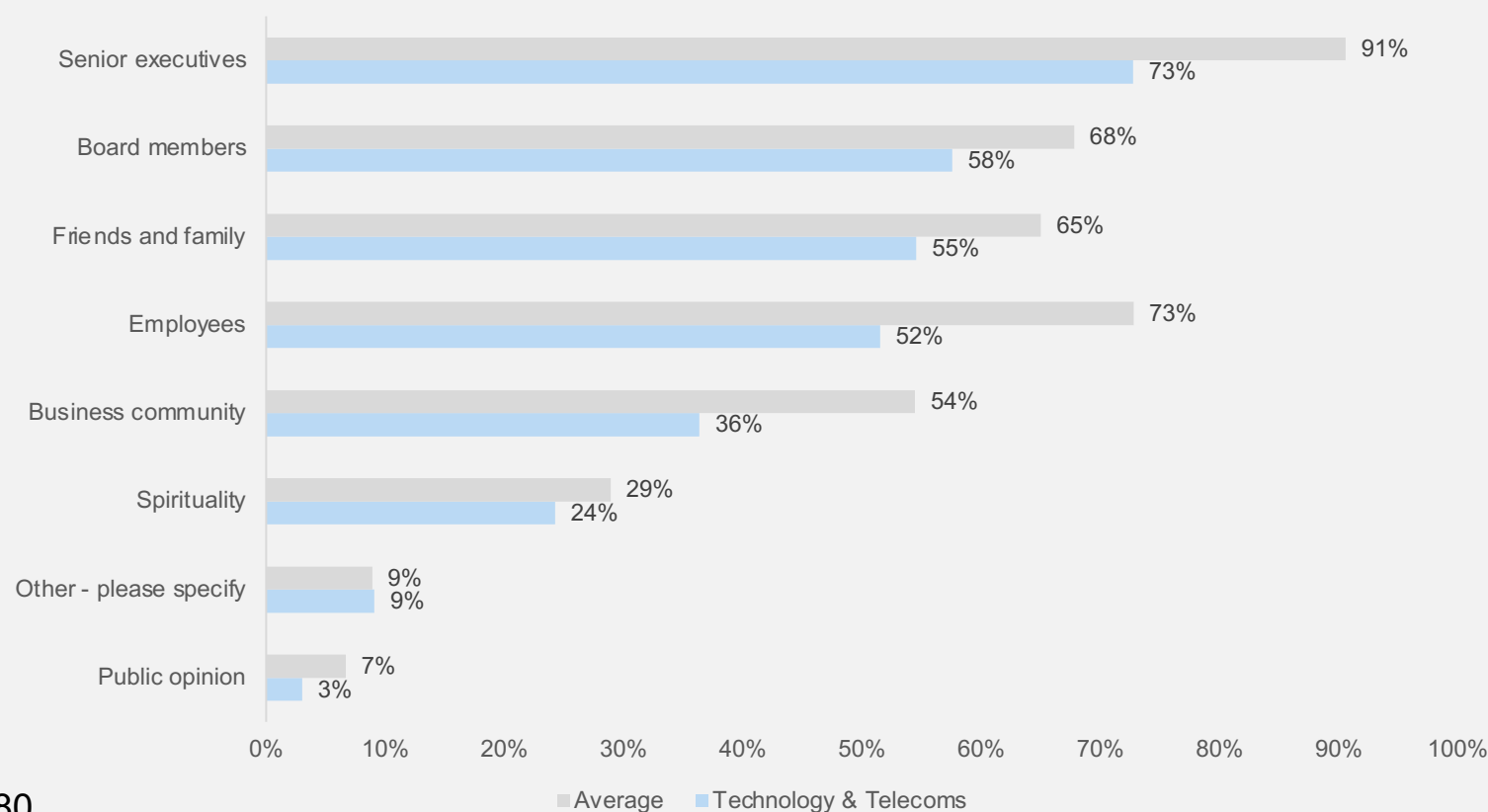
Qualities	Rank
Adaptability	1
Vision	2
Resilience	3
Empathy	4
Risk assessment	5
Personal courage	6
Stakeholder management	7
Political awareness	8
Social media awareness	9
Other - please specify	10

Respondents from organizations in the tech and telecommunications industries ranked adaptability as the top skill needed of leaders in the current environment—as did respondents from across the sample. But, the subset ranked empathy second, compared to the sample average rank of fourth.

n=181

Tech Leaders Go to Senior Executives for Support

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



73% of respondents from the tech and telecommunications industries indicated that leaders seek support from their senior executives, compared to an average figure of 91%. This makes senior executives the most popular source of support and strength across both groups. Following closely in the second ranking are board members, on which 58% of the subset rely, compared to a sample average of 68%.

n=180