# Untethered World

Leading in a Time of Chaos

Expanding Remit for Leaders

93% of respondents reported that they believe non-traditional business issues are a more significant part of their decision-making, compared to three years ago.

Non-traditional business issues are now a significant factor in decision-making.

93%	7%

■Yes ■No

0% 20% 40% 60% 80% 100%
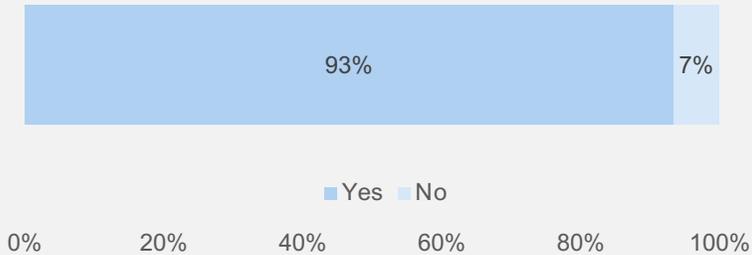
93% of respondents reported they believe non-traditional business issues are a significant part of their decision-making now, compared to three years ago.

n=209

Pressure to lead on social and political issues is mounting.

95%	5%

■Yes ■No

0% 20% 40% 60% 80% 100%
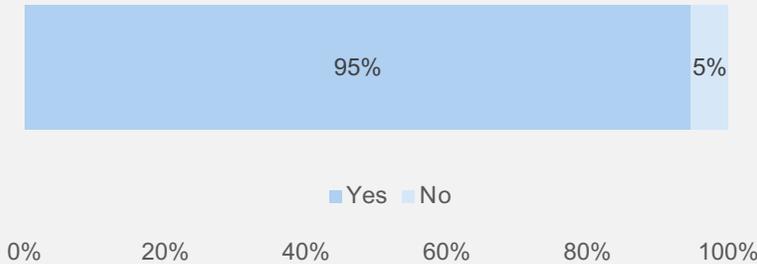
95% of respondents indicated that leaders are now under increased pressure to lead on social and political issues, compared to three years ago.

n=209

Leaders are managing a wider range of stakeholders compared to three years ago.

91%	9%

■Yes ■No

0% 20% 40% 60% 80% 100%
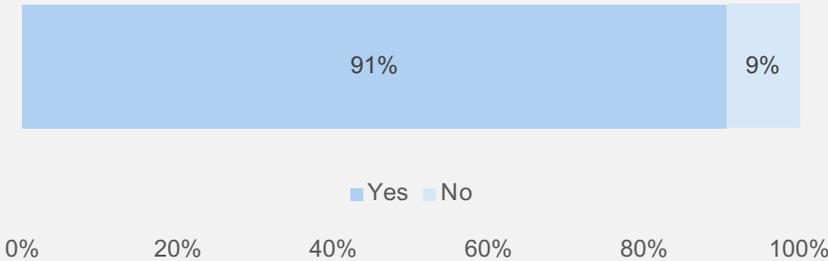
91% of respondents said that leaders are managing a wider range of stakeholders today than they were three years ago.

n=203

A New Era of Employee and Consumer Power

Consumers and employees are the most important stakeholders.

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	9

Leaders identify consumers and employees as the stakeholders with the most influence on their decisions.

n=204

Fear of employee turnover and consumer backlash keeps leaders up at night.

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

Employee turnover and consumer backlash are the greatest risks for leaders who fail to address major external crises appropriately.

n=195

Leaders are spending more time on more issues than ever before.

Key issues	Respondents
Employee retention	92%
Driving diversity and inclusivity initiatives	91%
Driving sustainability initiatives	91%
Employee mental health	89%
Responding to social issues	83%
Employee physical health and safety	82%
Responding to geopolitical conflicts	82%
Responding to political issues	69%
Community development and well-being	58%

Time spent on employee retention has increased significantly in the past three years, with 92% of leaders spending more time on retaining talent. 91% of respondents are spending more time driving diversity, inclusivity, and sustainability initiatives than three years ago.

n=200

PROCUREMENT LEADERS | G100 | EH R

In the Face of Vulnerability, Leaders Value Adaptability, Vision, and Resilience

Leaders need to be adaptable, visionary, and resilient

Skills/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

Adaptability, vision, and resilience are the top qualities that leaders need in the current environment.

n=181

Leaders feel an increasing sense of vulnerability when making decisions.

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

| 14% | 49% | 32% | 5% |

0%   20%   40%   60%   80%   100%

- Very vulnerable
- Vulnerable
- Slightly vulnerable
- Do not feel vulnerable
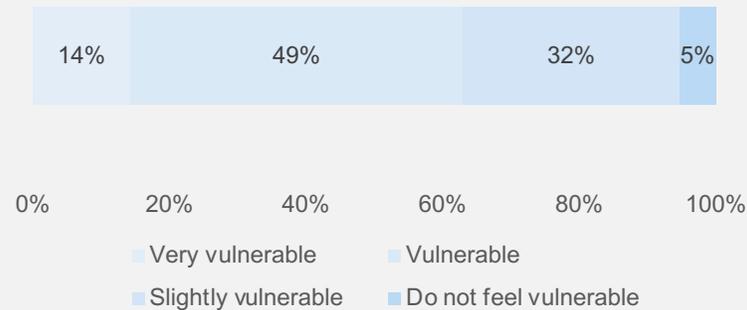
48% of respondents feel vulnerable, while 14% feel very vulnerable when making complex non-traditional business decisions.

n=189

Leaders draw support from senior executives and employees when making big decisions.

Sources of support	Rank
Senior executives	91%
Employees	72%
Board members	68%
Friends and family	65%
Business community	54%
Spirituality	29%
Other - please specify	9%
Public opinion	7%

Leaders are relying heavily on senior executives (91%) and employees (72%) for support when making decisions.

n=180

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%   7%

■ Yes ■ No

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%
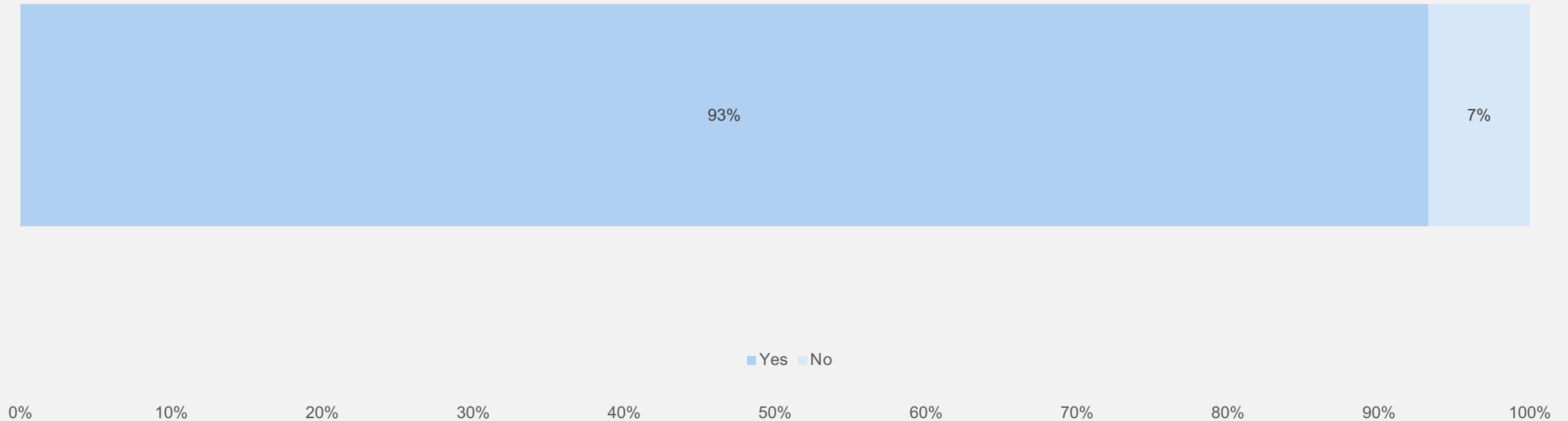
n=209

More Pressure to Take a Stance

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

95%   5%

■Yes ■No

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%
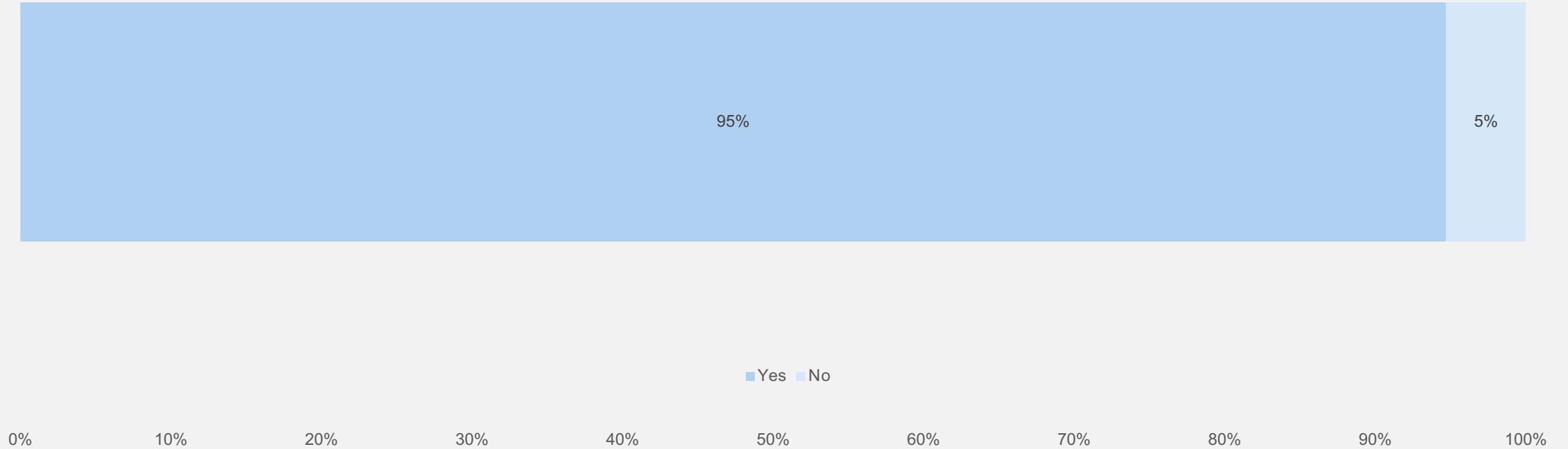
n=209

More Stakeholders to Manage

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

91%   9%

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

■ Yes   ■ No
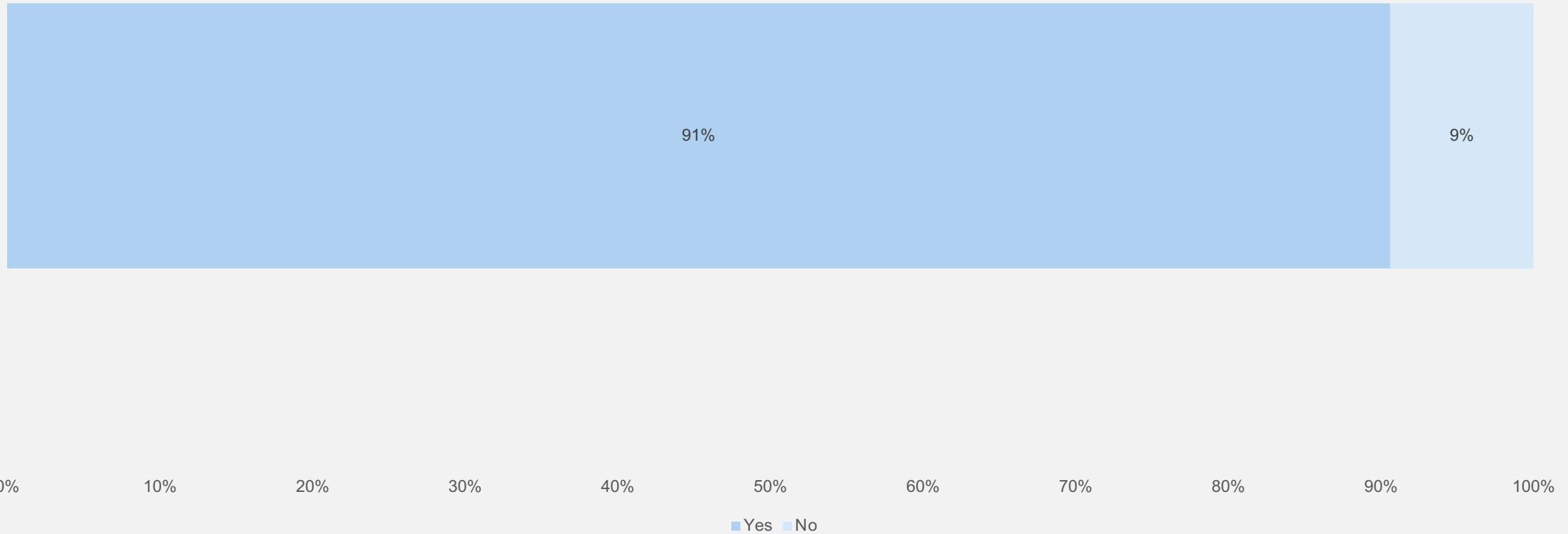
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Employee Reaction: Greatest Consideration for Leaders

Please rank the following considerations that influenced leaders when they were making complex decisions.*

Today

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

n=190

Three Years Ago

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

n=180

PROCUREMENT LEADERS | G100 | EHIR *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.

The Most Important Stakeholders: Consumers

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

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

n=204

Consumer Backlash is a Big Risk

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

| Stakeholder	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

n=195

Retention and ESG: The Hottest Topics for Leaders

How has the time spent by leaders on the following topics changed in the past three years?

Legend: Spending significantly more time | Spending slightly more time | Spending same amount of time | Spending slightly less time | Spending significantly less time

Topic	Significantly/Slightly more	Same	Slightly less	Significantly less
EMPLOYEE RETENTION	64%	28%	8%	1%
DRIVING DIVERSITY AND INCLUSIVITY INITIATIVES	68%	24%	8%	1%
DRIVING SUSTAINABILITY INITIATIVES	58%	33%	9%	1%
EMPLOYEE MENTAL HEALTH	48%	41%	10%	1%
RESPONDING TO SOCIAL ISSUES	35%	49%	17%	0%
EMPLOYEE PHYSICAL HEALTH AND SAFETY	53%	29%	17%	1%
RESPONDING TO GEOPOLITICAL CONFLICTS	41%	42%	18%	0%
RESPONDING TO POLITICAL ISSUES	24%	45%	30%	2%
COMMUNITY DEVELOPMENT AND WELL-BEING	16%	42%	38%	4%	1%

n=200

Executives Admit Vulnerability

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

■ Very vulnerable   ■ Vulnerable   ■ Slightly vulnerable   ■ Do not feel vulnerable

| 14% | 48% | 32% | 5% |
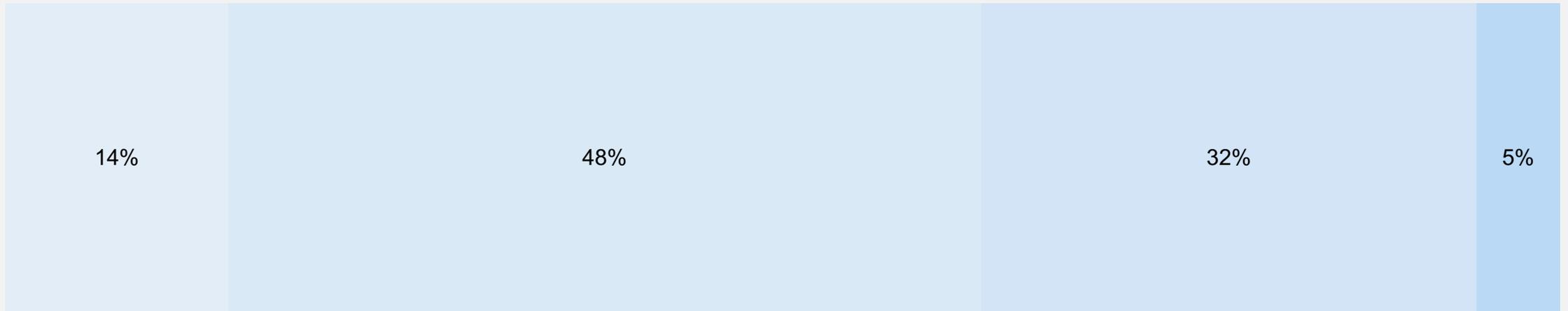
n=189

Most Needed Skills: Adaptability and Vision

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

Skills/capabilities	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

n=181

Senior Executives Provide the Most Support to Leaders

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

Category	Percentage
Senior executives	91%
Employees	72%
Board members	68%
Friends and family	65%
Business community	54%
Spirituality	29%
Other - please specify	9%
Public opinion	7%

n=180