



Going digital, faster

**Global survey into the impact
of COVID-19 on digital transformation**

KPMG International

home.kpmg/digitaltransformation





COVID-19 is accelerating digital transformation

Gaining a digital edge

Digital acceleration

Customer behavior: The drive for centricity

Operations/supply chain: Agile and responsive

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About the survey



“The pace and the degree of digital transformation is accelerating in the wake of COVID-19, with ever greater pressure to meet customers wherever they are. This calls for flexible, ‘commerce everywhere’ business models, and a renewed focus on employee experience to drive an enhanced customer experience.”

Miriam Hernandez-Kakol
Global Head of Management Consulting



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COVID-19 is accelerating digital transformation

Pre-COVID-19, private and public organizations were on a journey towards a digital business model, traveling at varying speeds. But the scale of the pandemic has forced a dramatic acceleration, both in the speed of change and the required investment in digital transformation.

Quarantine, social distancing and remote working have tested the ability to meet customers, citizens and patients where they are, via digital channels. Some have thrived but others have struggled. As KPMG's [2020 Customer Experience Excellence Report](#) emphasizes, it's the evolution of customer needs, attitudes and values that will most disrupt how businesses compete. Without a strong digital commerce capability, it's hard to compete.

Customer centricity is about more than just commerce. It means building the business model from the marketplace back; aligning the front, middle and back office to deliver a seamless customer experience. Another KPMG study, [The Connected Customer](#), found that 35 percent of customer experience-focused companies plan to adopt 'commerce everywhere' business models by 2022.

The pandemic has also focused minds on employees' wellbeing and values. An exceptional customer experience can only be delivered by people who believe in their organization's purpose, and who feel they are prized by both management and customers.

Not every business is ready to do this, with progress held back by aging infrastructure, inflexible human resources, lack of a clear purpose, and a fragmented approach to managing different functions.



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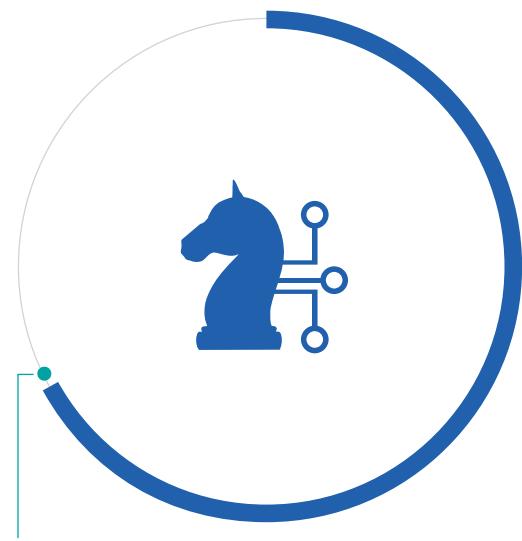
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Our global research into the current state of digital transformation

To better understand how COVID-19 has impacted companies' digital transformation strategies, in mid-late summer 2020, KPMG commissioned Forrester Consulting to survey 780 digital transformation strategy leaders in 10 countries across 12 sectors.¹

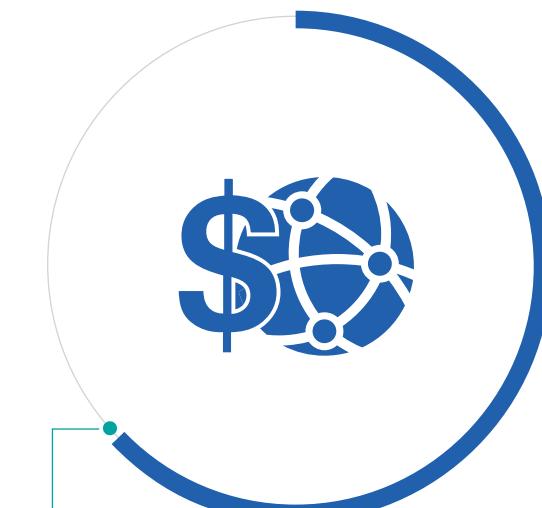
The responses show that digital transformation has indeed taken on greater urgency:



The leaders participating in the survey viewed digital transformation as a requirement for competing today and a strategy for winning in the longer term. And they're investing heavily in technologies to achieve this goal.

But will this be enough?

We strongly believe that without a coordinated, connected approach, the new digital organization may suffer many of the shortcomings of traditional models: siloed functions, unresponsive operations/supply chains, and a constant battle to access the right talent.



Why you should read this paper

- To help your organization increase the pace of digital change, in order to give customers what they want, where they want it
- To help make your organization more resilient and adaptable, to cope with crises like COVID-19, and to address continual and growing market disruption



Miriam Hernandez-Kakol
Global Head of Management Consulting

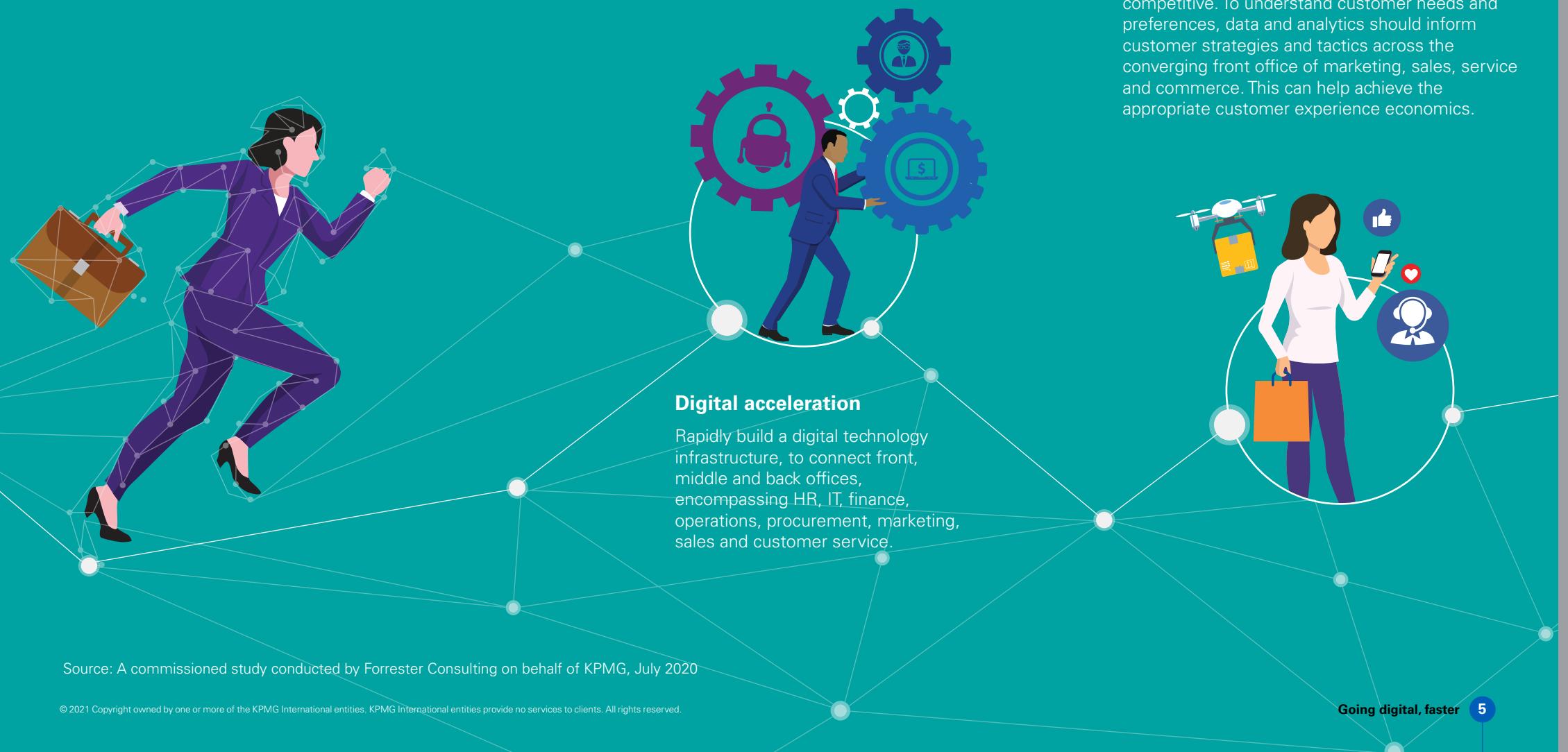
¹ A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020

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Gaining a digital edge

To compete in the digital, post-COVID-19 age, organizations must attain the capability to connect digitally with customers, suppliers and employees. This means addressing five key challenges:



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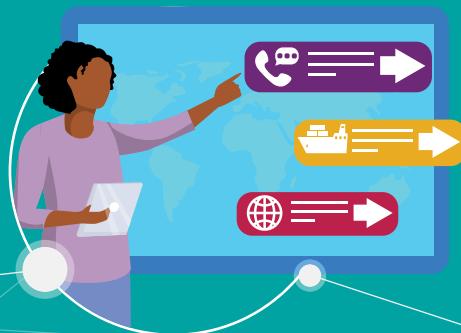
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Supply Chain and operations

Supply chain and operations must become more reliable and responsive. By digitally connecting and working more closely with suppliers and service providers, companies improve flexibility to respond to fast-changing customer needs. Suppliers become an extension of the business and are involved in strategy and product development, thus blurring organizational boundaries. Indeed, the roles of varying players in the operations/supply chain may change continually up or downstream, as the chain becomes more modular in nature.

By using internal and external data, available in real time, operations/supply chain leaders can use analytics to assess both demand and cost to serve, pick up early warning signals from the market and take swift, decisive action. Over time, decision-making should be enhanced by ever more advanced technologies and cognitive capabilities. The result? Greater operational resilience to ensure continued access to products, materials, people and services.



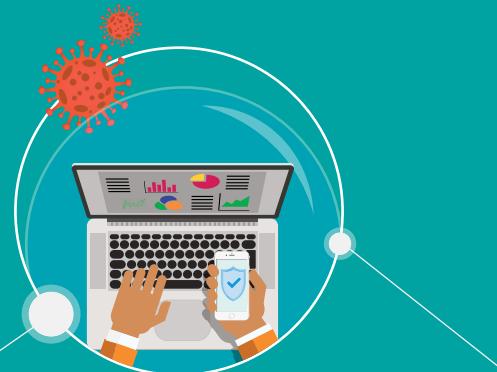
Ways of working

The way in which work gets done has changed and organizations must adapt, to become nimbler, scaling up or down swiftly, entering new markets and exiting old ones. COVID-19 has reinforced the need for efficient remote working, but companies also need to 'shape' their workforces, to ensure they can access the skills they need — when they need them. Many enterprises recognize the need to radically change their shape, size, and structure, and to acquire a range of new skills. Through strategic reskilling initiatives, and by embracing the professional 'gig' economy, they can benefit both workers and employers. Additionally, shared services, partnerships, alliances and strategic use of retired staff, brings access to vital talent on a short-to-medium term basis. The 'workforce of the future ecosystem' is becoming more and more digital, increasingly augmented by automation as well as contingent workers.

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020

Resilience

COVID-19 has demonstrated that the 'digitally enabled' enterprise is in fact the 'resilient' enterprise; digitally enabled organizations have the capabilities to withstand the impact of pandemics (and other shocks) and should be far more agile on their path to recovery. And, because they benefit from enhanced insights, these organizations are less dependent upon manual intervention, location and market forces.





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Digital-transformed firms will likely have the edge in the COVID-19 recovery phase. They can respond with greater agility to customer, employee and supplier needs, because their decisions are informed by data — while automation helps them scale faster. ”

Miriam Hernandez-Kakol

Global Head of Management Consulting

Short-term priorities call for long-term, digital solutions

COVID-19 has caused leaders to rethink their priorities, with an emphasis on immediate challenges. The leaders we surveyed highlight significant challenges like falling revenues, security concerns and interrupted supply chains, which have focused minds on the here and now and demand immediate action. In addressing these concerns, they are also starting to realize that the inexorable shift to digital has become today's — rather than tomorrow's — priority.

Top 5 COVID-19-related priorities



Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020



We need to assess new ways to communicate with our customers and implement new strategies to ensure the safety of our customers and employees. ”

Survey respondent,
Banking sector, Europe



The COVID-19 difference... digital has risen up the agenda

Digital transformation was already high on most organizations' agendas even before the pandemic and has only risen in its importance since:



69%

of respondents say their digital transformation strategy was a 'high' or 'top' priority prior to the pandemic



67%

say they've accelerated their digital transformation strategy since COVID-19



63%

say they've increased their digital transformation budget since COVID-19

These findings are consistent with the [2020 Harvey Nash/KPMG CIO Survey](#) results which show that during the three-month period (May-August 2020), technology spend grew at a greater rate than at any point in history, with technology leaders reporting a median additional spend of 5 percent to deal with the COVID-19 crisis.²

Strategic priorities amplified since COVID-19



“Due to the impact of the COVID-19 epidemic, the global economy is in a tense situation. Our company has accelerated the speed of digital transformation to improve the impact of the epidemic on us and the world and change the communication between enterprises and customers.”

Survey respondent,
Asset management sector, Asia

² Base: 1,299 professionals involved with customer-centric strategy decisions

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020

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There are three defining characteristics of customer-centric, digitally connected businesses:

- 1. They think ‘outside-in’ and intimately understand the evolving consumer and the marketplace**
- 2. They create engaging customer experiences wherever the customer may be**
- 3. They execute seamlessly, by connecting the whole enterprise and delivering as one. ”**

Julio Hernandez

Americas Lead, Connected Enterprise
Principal, Customer Advisory
Practice Lead
KPMG in the US

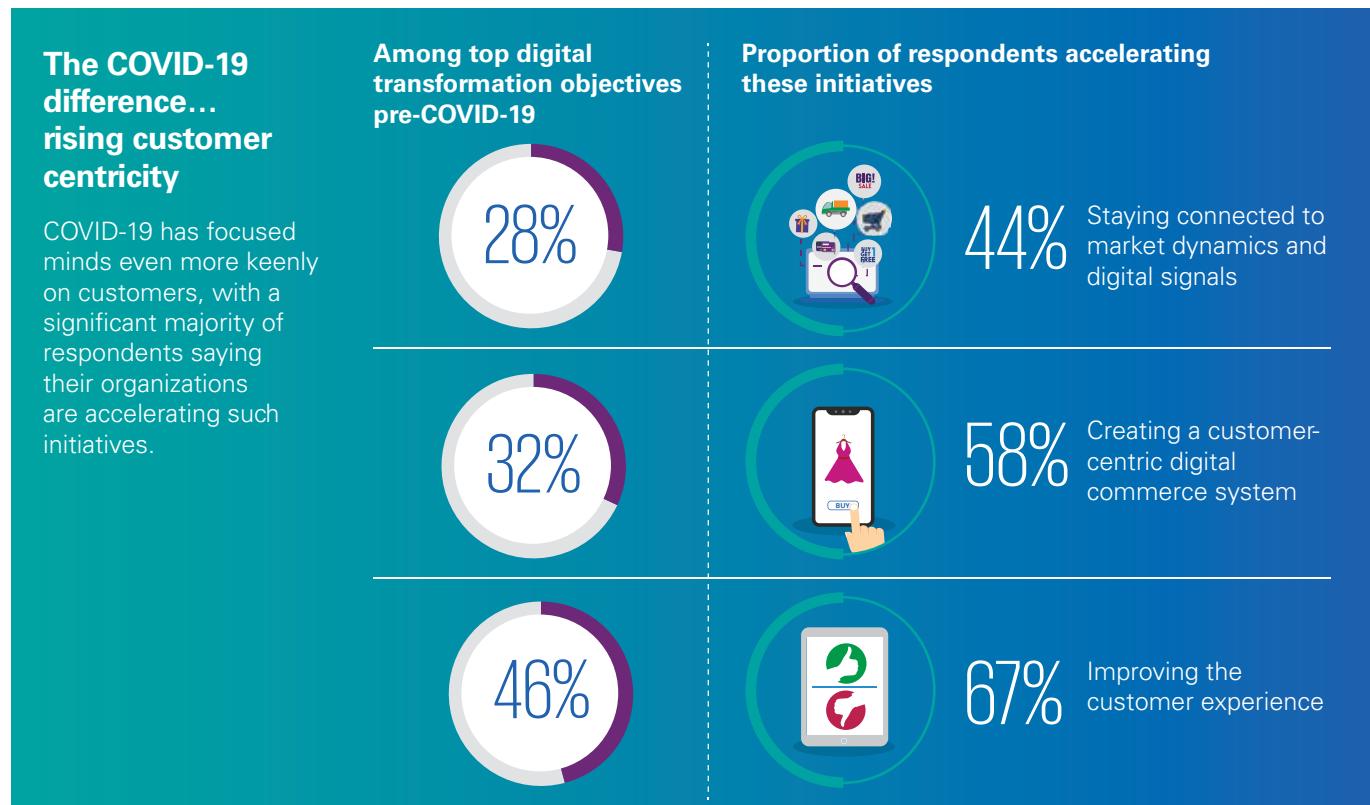
Customers are more demanding than ever. Accustomed to the convenience of online commerce during lockdown, they're now expecting digital channels to provide a smoother and efficient customer experience.

Digitally transformed companies can gain a vital edge by meeting the customer where they are. By taking an 'outside-in' perspective, they scan the marketplace, pick out their desired customer segments, and organize the entire organization around the customer.

This requires a complete commitment to digital, encompassing direct-to-consumer delivery, data analytics, and a convergence of the front office including marketing, sales, service and commerce.

For these organizations, COVID-19 has provided a chance to really shine and can even lower costs to serve. The top-ranked brands in [KPMG's 2020 Customer Experience Excellence Report](#) typically outperform their peers — in terms of customer experience ratings — by between 10-12 percent.

The leaders in our survey tell a similar story. They say their organizations' top digital transformation drivers are largely customer focused — with an emphasis on improving customer experience, creating customer centric digital commerce, and picking up market signals swiftly to respond to changing tastes and purchasing behavior.

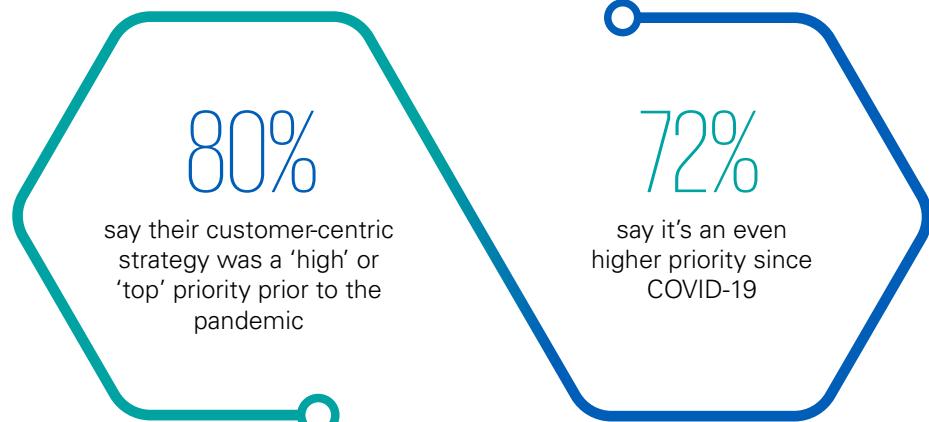




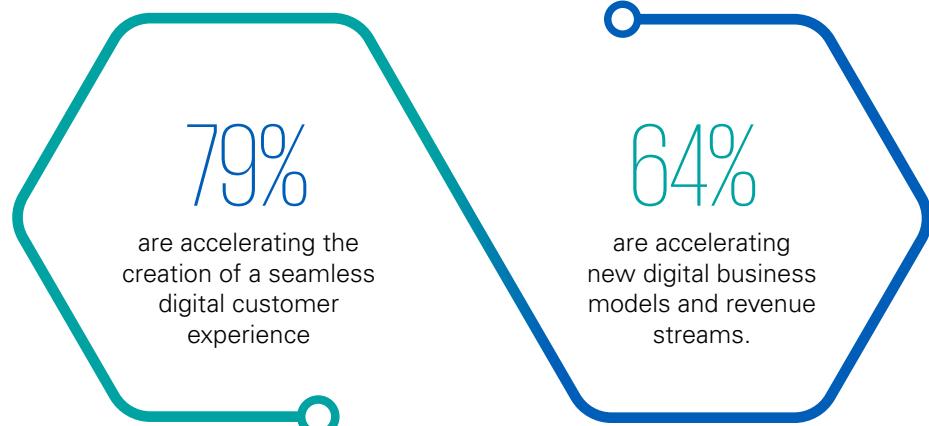
These findings resonate with the views of CEOs, as expressed in [KPMG's 2020 Global CEO Outlook](#). Respondents to this survey feel the pandemic has accelerated the need to create a seamless digital customer experience and create new digital business models and revenue streams.



Customer-centricity
has become an even
bigger priority



CEOs are also aiming
for digital customer
centricity in the wake
of COVID-19*



Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020

*Source: KPMG Global 2020 CEO Outlook



Leading brands are starting to view customers as assets that should be protected, nurtured and invested in. Customer loyalty is seen as a form of 'equity' in the company. And they're thinking how to move customers onto their balance sheets as permanent, valuable assets. ”

Adrian Clamp

EMA Lead, Connected Enterprise
Partner, Digital Transformation Lead
KPMG in the UK

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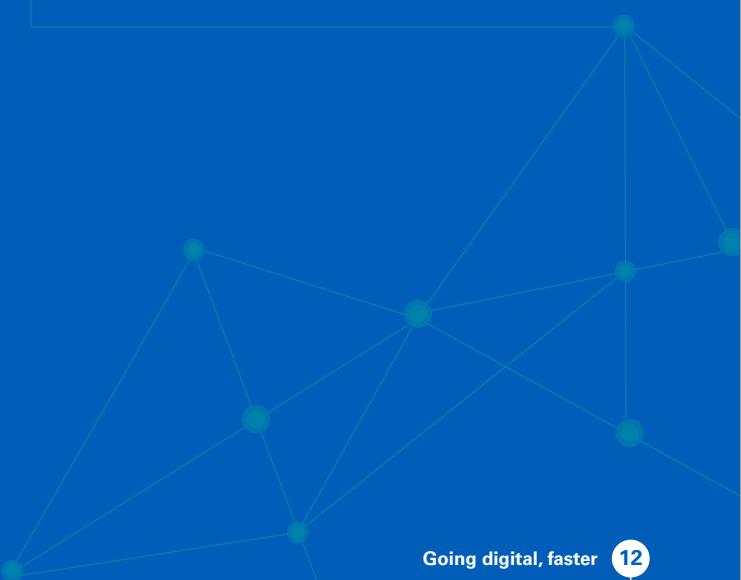
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A responsive operations and supply chain is the single biggest digital transformation priority for organizations:

80%

say it's a 'top' or 'high' priority



Supply chain and inventory management software are being procured on a priority basis; the rest will be done later. **“**

Survey respondent,
Healthcare sector,
Asia Pacific

COVID-19 has put supply chains under intense strain. In a very short timeframe, demand for different items has risen and fallen dramatically, with producers struggling to adjust their operations accordingly. This has led to long waits and turnaround times for service organizations, resulting in product shortages, excess stock and frustrated customers.

As organizations covet highly responsive digital supply chains and operations, there is a big push to digitally transform these activities, in order to become more agile and resilient.

The COVID-19 difference... supply chain resilience

Perhaps not surprisingly, 'supply chain breakdown' was listed by survey respondents as the third biggest impact of COVID-19 — and the third highest priority for their organization.

When asked to name their highest digital transformation priority, 80 percent of respondents say it's having a responsive operations and supply chain — more than any other part of the business.

Traditional supplier relationships are based on weighty contracts with strict, defined budgets and service levels — and penalties for failing to meet deadlines and quality.

But, as a recent KPMG paper, [Building Supply Chain Resilience Through Digital Transformation](#) argues, "The supply chain mantra is changing from efficiency and low-cost country sourcing, to supply chain resilience and visibility to reduce complexity and uncertainty. The acceleration of digital transformation is key to that new way forward."

In the healthcare sector, for instance, [KPMG's Supply Chain Predictor](#) uses a 'digital-twin' view of operations/supply chain to model the future, and help hospitals maintain supplies of vital personal protective equipment.

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020



Producers want to get much closer to their suppliers, work together to come up with exciting new products, and find ways to adapt quickly to fast-changing customer demands. This requires investment in predictive technology, to model the future and pick up marketplace signals. **”**

Chris Foster
Global Head Operations
Center of Excellence

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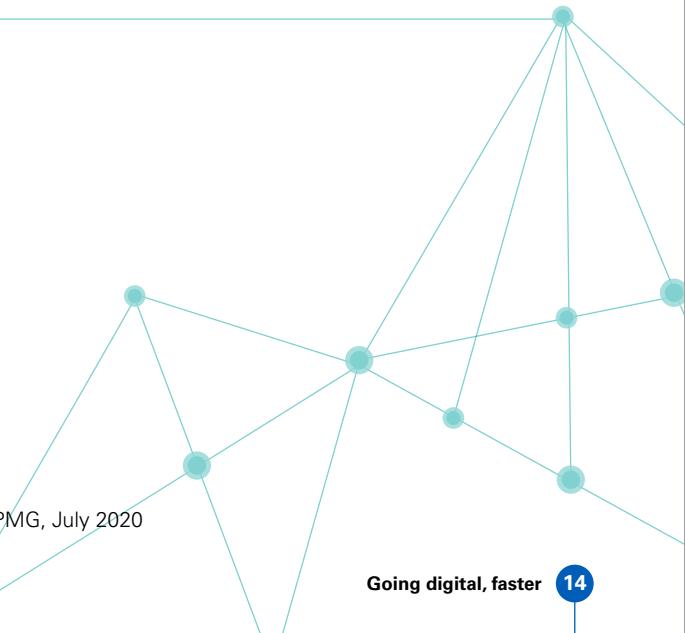
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Ways of working: Workforces in digitally transformed organizations



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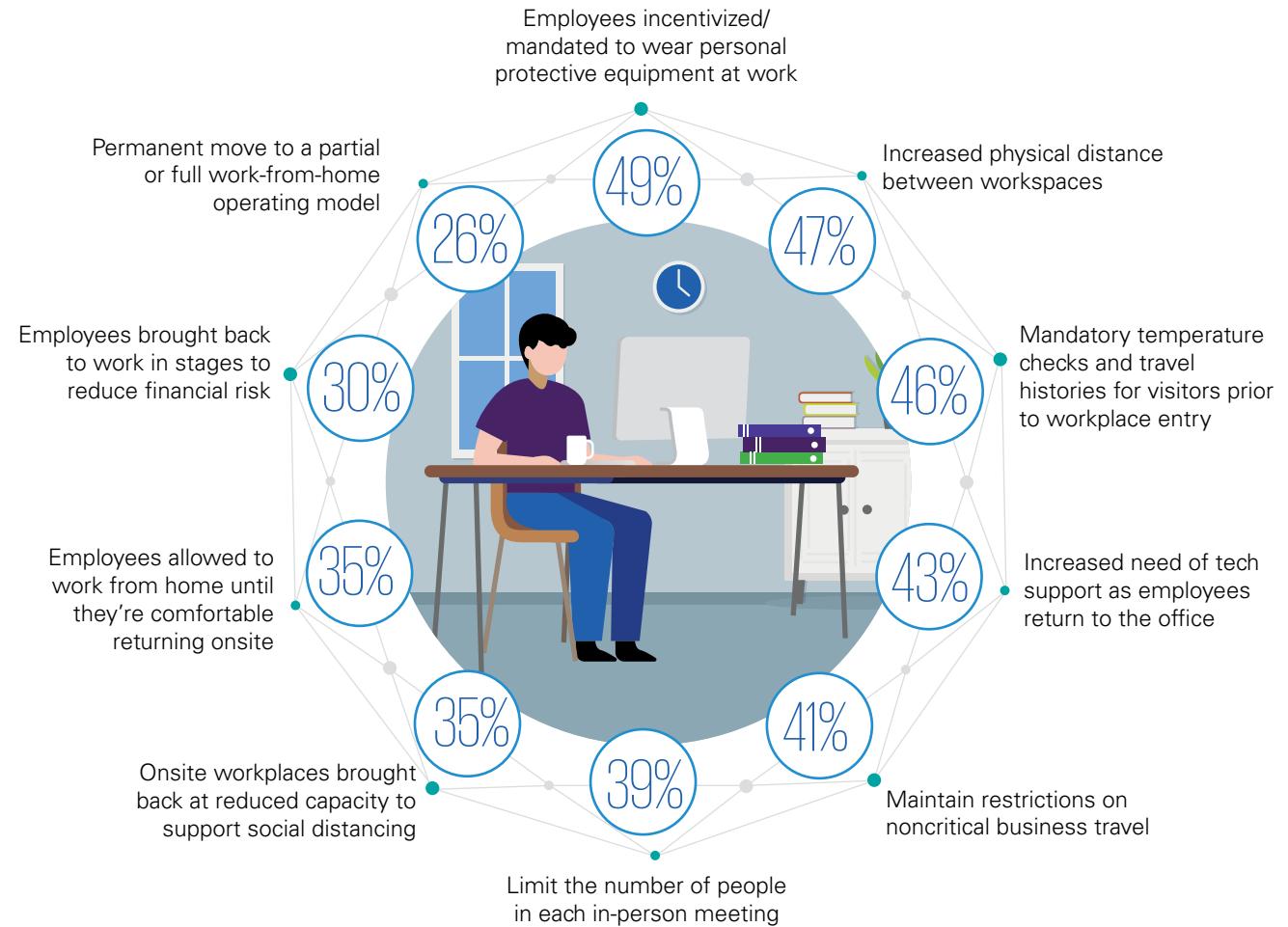
When considering the future workforce in a digital world, companies must adapt the way they manage talent. Workforce shaping involves matching skills to tasks, accessing talent via platforms.”

Robert Bolton

Global People & Change Center of Excellence Lead, and Partner KPMG in the UK

Not surprisingly, the prime concern for organizations has been to keep workers safe during the prolonged pandemic. Protective equipment, social distancing, and testing are the top three priorities for our respondents' companies. Technical support for remote working is a further imperative.

The COVID-19 difference...the future of work



Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020



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Organizational flexibility is becoming a top priority. Digitally-transformed organizations have an opportunity to flex/expand their talent base to meet growing demand, unconstrained by physical limitations of location or office space. ”

Michael DiClaudio

Principal, Human Capital Advisory,
KPMG in the US

Shaping a future, digitally transformed workforce

KPMG's [2020 Global CEO Outlook](#) reveals that leaders are especially worried about the future of their workforce. When asked about the greatest challenge to accelerating digital transformation, the single biggest factor is a lack of insight into future operational scenarios. In short: it's hard to predict what the post-COVID-19 workplace will look like. On top of this, the same survey places talent risk as the biggest threat to long-term growth — rising eleven places in just 1 year.

Workforce shaping is a response to this uncertainty, introducing a dynamic approach to planning resource needs. Using horizon scanning and scenario planning, along with dialogue with business units, organizations can chart what skills they need — and where they need them. In the KPMG survey [The Future of HR 2020](#), those companies that embraced workforce shaping reported greater levels of value add to the business from People/HR Management.

The same survey emphasizes the need to retrain workers in essential skills. Seventy-seven percent of respondents plan to upskill up to 30 percent of their workforce in digital capabilities over the next 2–3 years.

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020

In becoming digital, organizations may well seek to access skills on an as-a-service basis — via managed services. This can help them acquire vital automation capabilities and reduce fixed office costs.

The leaders taking part in our global survey recognize the need for a customer-centric organization and culture, which inspires people to deliver the customer promise and drive up business performance.

Health, wellness and purpose are also taking center stage, as we all seek greater meaning from work. According to [KPMG's 2020 Customer Experience Excellence Report](#), 41 percent of customers say that, as a result of COVID-19, the welfare and wellbeing of employees is more likely to impact which brands they buy.

Automating business processes

Automation across the front, middle and back offices enables organizations to reduce costs and improve efficiency, augmenting existing human capabilities. In an age where health has become paramount, they can also enable certain jobs to function with little or no human contact.

63%

are prioritizing an aligned and empowered workforce to support digital transformation



The future of work

The 'way an organization works' encompasses a wide range of functions beyond the physical workforce. Factors such as operating models, back office transformation and automation will all impact the way that tasks are carried out, which in turn drives the demand for skills and capabilities.

In future, an organization's footprint is likely to be significantly different, with a combination of actual and virtual resources for both operations and delivery of products and services. The culture and leadership will also influence the approach to work, particularly issues such as wellness and performance management.

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Organizations should be aiming for greater resilience by embracing digital business models, building cost-efficient, agile operations, while addressing fraud, cyber-crime and operational risks.”

Phil Lageschulte

Global Risk Consulting Information Technology Advisory and Emerging Technology Risk Lead, and Partner KPMG in the US

“
We have moved to a multi-cloud platform, initiated AI and IoT, and are providing customers with more online purchase and customer service options.”

Survey respondent,

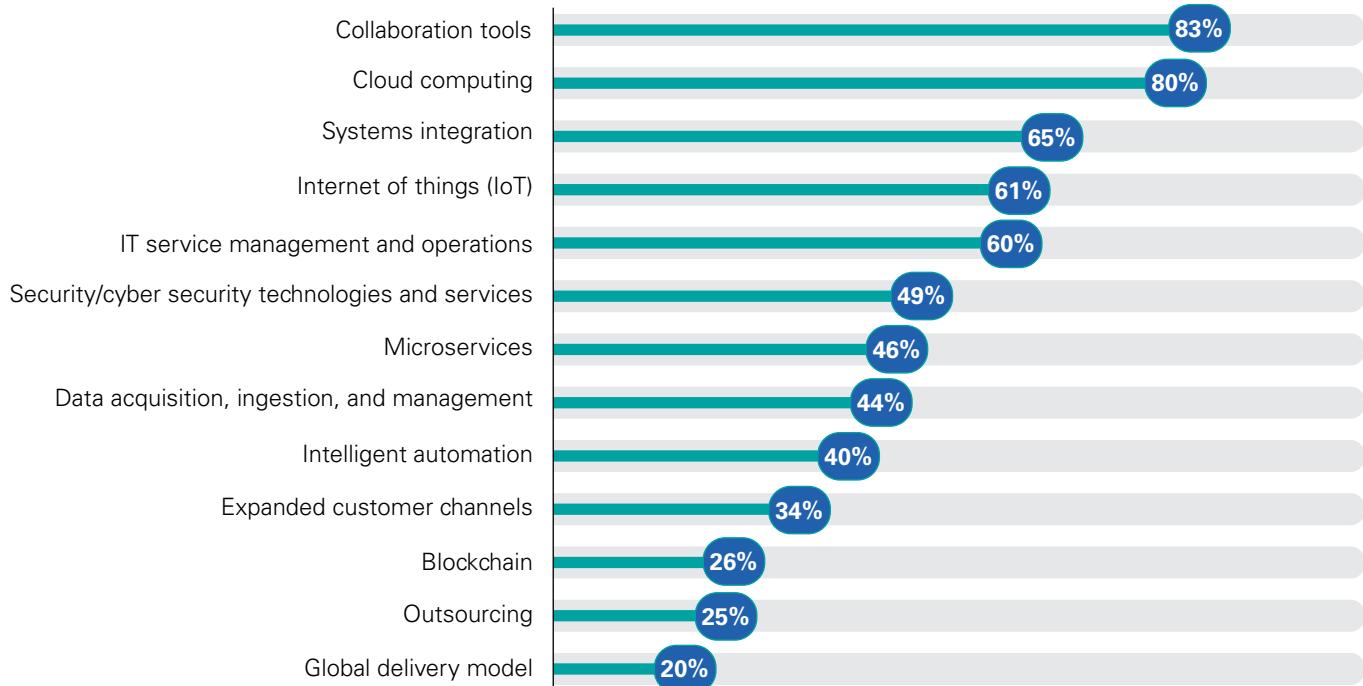
Industrial manufacturing sector,
North America

Even before COVID-19 entered our lives, the pace of disruption in recent years has made leaders eager to create more resilient and agile organizations able to adapt swiftly to ever-changing circumstances.

As companies tackle a constant state of ‘business as unusual’, they’re embracing technologies to help rapidly flex their operational and business models.

Eight out of 10 leaders taking part in our survey report that their organizations are leveraging collaboration tools and cloud computing to enable their digital transformation along with systems integration, IoT, and IT service management and operations.

Key technology that organizations are investing in



Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, July 2020

The COVID-19 difference: Investing in value and resilience via a connected enterprise



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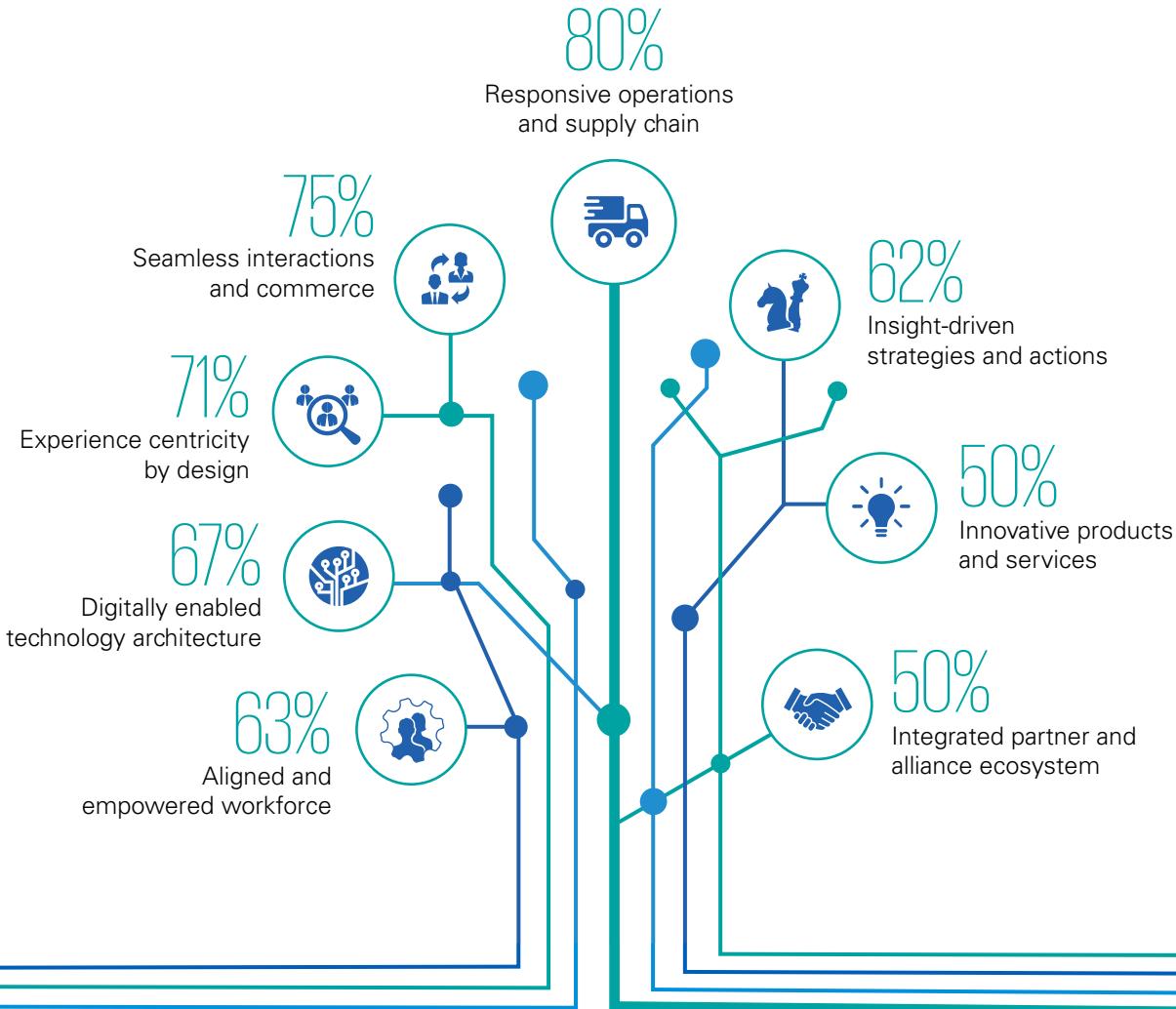
KPMG has identified eight key capabilities inherent in a 'connected enterprise', where functional silos are broken down, and every part of the organization is focused, and works together, to meet customer expectations, create business value and drive sustainable growth.

Evolving into a digitally connected enterprise can increase resilience to future shocks and disruption, and give companies the speed and agility to adapt to changing customer demands. Research shows that firms that make a moderate or significant investment in all eight capabilities are 2.1x times as likely to deliver a customer experience that exceeds expectations, and achieve ROI on one or more metrics.³

The respondents to our global survey are prioritizing a number of these capabilities, as they seek greater customer centricity.



Digital transformation priorities across the eight capabilities of a connected enterprise*



*Proportion of respondents rating this capability a 'top' or 'high' priority

³ Harvey Nash/KPMG CIO Survey 2020

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, September 2018

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As organizations across all sectors, private and public, consider their future shape, they should be aware of the huge opportunities that digital transformation can bring.

Many organizations are held back by a fragmented digital infrastructure and lack of alignment between front, middle and back office functions. This hinders their efforts to offer a seamless customer experience — hence the need to become a digitally connected enterprise, oriented around the customer.

Five actions you can take now

Operations/supply chain

Invest in real-time, predictive models, rethink the roles of each player in the supply chain, and introduce a more collaborative relationship with suppliers, to increase innovation and flexibility.

Customer

Put your customers first — at the heart of strategy. Become insight driven — know your customers at a deep and profound level. And practice customer foresight — to anticipate customer needs, and become organized around the customer and able to meet the customer wherever they are.

Digital acceleration

If you're not digitally transforming at pace, the chances are you'll be left behind. Converge digital with broader strategy, to swiftly adopt new technologies and flexible, modular — in some cases virtual — organizational structures.



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4



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Ways of working

Focus on the capabilities you need in a future connected enterprise, and plan how to access these resources via permanent, gig economy or other partnerships, while investing in upskilling — especially in digital skills. Rethink the balance between physical and virtual assets and human resources, embracing automation.

Resilience

Consider the technologies that can get you closer to the customer, and help you manage a constant, heightened risk environment, particularly cyber security, governance and ethics. Your technology investments should be aligned with your wider strategic goal of customer centricity — which means focusing on the eight capabilities of a connected enterprise.



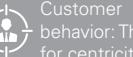
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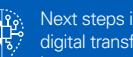
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This online survey encompassed 780 digital transformation strategy leaders in 10 countries and territories across 12 sectors



Countries and territories

Australia, Brazil, Canada, France, Germany, Hong Kong (SAR), China, India, Italy, mainland China, UK, US



Industries

Healthcare provider, life sciences, government, human/social services, banking (retail, commercial, mortgage), insurance, asset management, CPG, retail, industrial manufacturing, technology, telecoms services



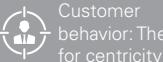
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Getting in touch

If you'd like to discuss any element of this research or find out more about how a Connected Enterprise can exponentially drive return on your transformation investment, please contact us.

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Designed by Evaleserve.

Publication name: Going digital, faster | Publication number: 137170-G | Publication date: January 2021



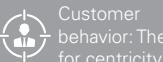
COVID-19 is accelerating digital transformation



Gaining a digital edge



Digital acceleration



Customer behavior: The drive for centricity



Operations/supply chain: Agile and responsive



Ways of working



Resilience



The COVID-19 difference



Next steps in the digital transformation journey



About the survey