

REASSESSING DIGITAL TRANSFORMATION

The Culture and Process Change Imperative

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At its simplest, “culture” is a shared and implicit understanding among a group of people. It is the way knowledge, processes, and habits are passed from person to person. And outside of Darwinian evolution, culture is the other important means by which humans evolve.

Culture is equally powerful in the realm of business. It can define business, and often directly influences that business’s ability to succeed. As evidenced by this report, many C-suite executives not

only recognize this, but struggle to improve or even change at least some aspects of their corporate cultures.

Why Is Culture So Complex?

Cultural habits are ingrained in networks of people, rather than in any one individual or group, and are reinforced and strengthened over time.

There is no single “business culture.” Within a large organization, there can be 60 or 70 different cultures across different departments or offices; any employee who has ever visited a branch office in a different city can certainly attest to this. The logo on the door may be the same, but crossing the threshold into the office itself can feel like entering a foreign country.

Culture across teams can feel vastly different as well. Who leads discussions? Do individuals jump in with ideas, or do they wait until the end or use email to give suggestions? Will asking for feedback be welcomed, or is it considered impolite, as is the case in some countries?

How Can Culture Be Changed?

In any organization, people come and go. But culture, such as ways to solve problems or negotiation habits, is sticky.

Just as it takes a long time for a person to change a bad habit, it can take even longer for a network of people to change a pattern of behavior. As with quitting smoking or learning to play an instrument, progress is strengthened via muscle memory from training, repetition, reinforcement of good behavior, and correction of unwanted behavior.

What Roles Do Leaders Play?

Even though management may initially instigate cultural changes, a leader can’t simply tell employees, “Our culture is going to change today.” Certainly, modeling a desired behavior is much more effective than telling somebody what to do. However, for a group to truly adopt new behaviors, the cultural ingredients for learning and growing must be present—executives cannot expect change overnight.

In addition to leading by example, leaders can create robust systems for providing fast feedback to teams and beginning to reshape their behavior and cultural norms. This involves a shift in mindset—that great ideas can come from anywhere in the company—as well as a shift in operations. People need to be in networks that are going to support innovation rather than squash it because “that’s the way we’ve always done it.”

The best leaders find ways to facilitate innovation via meritocracy. They employ a system of reasoned debate, where individuals have the freedom to share ideas and measure against reality to see what works.

This process of innovation trains the network to elicit and reward good ideas and good habits. In the process, it changes the company’s culture.

Will It Be Easy?

No. Changing a corporate culture is extremely challenging and requires a lot of time and patience. That’s because culture can feel extraordinarily nebulous. It can be slow to change.

But it can be changed. By taking some initial steps—getting a handle on what culture is, how it is formed, and how to guide it in new directions—leaders can begin the process of changing their corporate cultures and setting their organizations up for a new and better future.

BUILDING THE RIGHT FOUNDATION FOR DIGITAL TRANSFORMATION

Practices for Uniting Teams, Technology, and Culture

There is intense pressure on organizations to transform their enterprises to remain more competitive in an age of disruption. This digital transformation imperative requires organizations to improve—and often completely overhaul—their technical capabilities. But true transformation demands more than just new technologies. It requires strategic vision and commitment from the top of the organization to rethink and retool the three main attributes of the modern enterprise—its culture, its processes, and its technology. Any effective digital business leader will tell you that introducing new technology is the easier part; it’s the cultural and process changes that can thwart transformation progress.

That is why, several years into these efforts, many organizations are struggling to truly transform the way they operate, according to a new survey of 734 business leaders conducted by Harvard Business Review Analytic Services in July 2018. Just 13% of respondents rate their digital transformation efforts to date as very effective. **FIGURE 1** “There are no companies that have come out the other side of digital transformation,” says Melissa Swift, senior client partner and leader of Korn Ferry’s Digital Advisory. “While it is possible to make progress on strictly a technology basis or even to reengineer some processes, the people side of transformation is tough.”

The vast majority of respondents understand that having a combination of the right technologies, processes, and culture in place is key to the success of digital change efforts. However, they are struggling—chiefly with cultural impediments and, to a somewhat lesser degree, with implementing the necessary processes and technology capabilities.

Likewise, respondents agree on what the best measures of digital transformation progress should be, but the majority are failing to actually use those metrics to monitor their efforts. In addition, they are seeing only limited success in these areas to date as a result of their digital transformation projects.

“The enthusiasm for digital transformation from five years ago is giving way to a strong dose of realism,” says George Westerman, principal research scientist at the MIT Initiative on the Digital Economy. “The reality is that progress comes from changing the organization. And changing the organization is just hard.”

HIGHLIGHTS:

13%

OF RESPONDENTS RATE THEIR DIGITAL TRANSFORMATION EFFORTS TO DATE AS VERY EFFECTIVE

85%

OF RESPONDENTS SAID THAT HAVING A COMBINATION OF THE RIGHT TECHNOLOGY, PROCESSES, AND CULTURE IN PLACE WAS VERY IMPORTANT

However, those respondents who rated their digital transformation efforts as very effective offer insight for other organizations looking to improve their own results. These digital transformation leaders report encountering identical cultural, process, and technology hurdles as the rest of respondents. Nonetheless, they are overcoming them. Larger numbers of respondents in this group are embracing more transparent, open, and collaborative cultures. They are

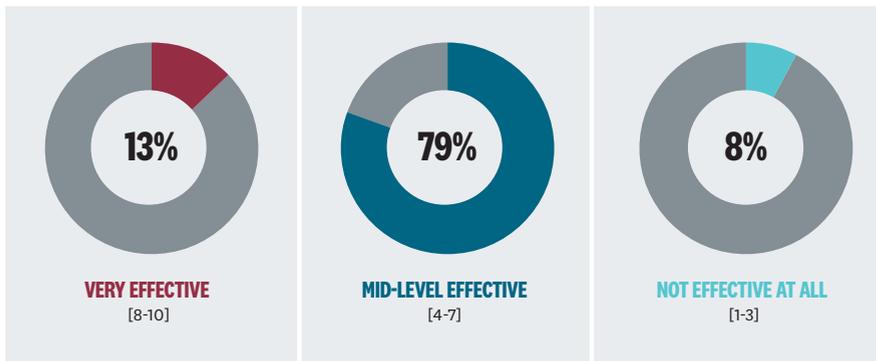
also adopting more processes like agile and DevOps approaches in greater numbers. And the vast majority of them are acquiring new technology capabilities that enable them to respond rapidly to customer demands, update systems efficiently, and develop and deliver new applications quickly, for example. What's more, they're making an effort to measure the impact of their transformation efforts using key performance indicators. Most importantly, they are beginning to see results in those measures of performance including revenue growth, market position, operational efficiency, and employee satisfaction.

FIGURE 1

DIGITAL TRANSFORMATION PROGRESS

How effective would you say your company's digital transformation efforts have been to date?

[1-10 SCALE; 1=NOT AT ALL EFFECTIVE; 10=EXTREMELY EFFECTIVE]

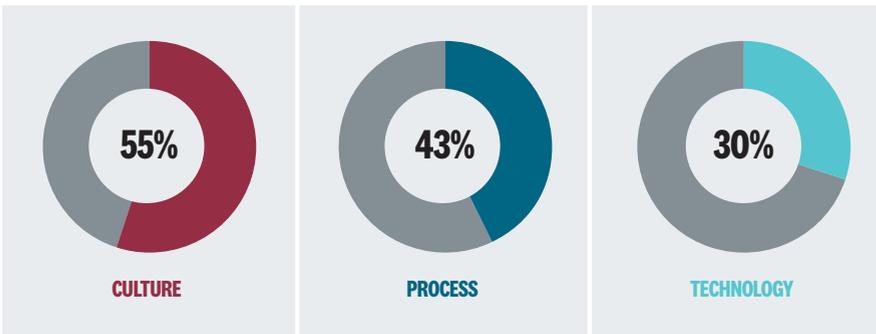


SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

FIGURE 2

BARRIERS TO DIGITAL TRANSFORMATION

Percentage of respondents who said each of the following was a significant impediment/challenge to their organization's digital transformation efforts



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

Culture and Process Challenges Impede Digital Transformation

When asked about the most important factors in the successful digital transformation efforts within their organizations, an overwhelming majority of respondents—85%—said that having a combination of the right technology, processes, and culture in place was very important. That shouldn't be surprising. "People, process, and technology have always been the secret ingredients for all IT-enabled change," says Thomas H. Davenport, President's Distinguished Professor of Information Technology and Management at Babson College.

However, companies are struggling in particular with the cultural challenges. More than half of respondents said that culture has been a significant challenge to their organization's digital transformation efforts, while 43% said the same for process, and less than a third cited technology as a sizable hurdle. **FIGURE 2** Interestingly, digital transformation leaders (those 13% of respondents rating their digital transformation efforts as very effective) were not immune to these issues, reporting each of the challenges at similar levels.

The problem for many organizations, says Westerman, is that leaders have focused on the wrong part of digital transformation. "They're paying attention to 'digital' when 'transformation' is what matters. It's

not about having a mobile app; it's about creating a completely different customer experience. It's not about implementing analytics; it's about being able to personalize one-to-one. All the talk about technology sometimes detracts from the hard work of changing the way the company works." That demands cultural and process change.

"Very few organizations have had culture-specific initiatives in the area of digital transformation. They buy a lot of technology and, in some cases, change processes," says Davenport. "But really trying to change their culture in a direction that's more digital or data-driven has been rare."

The Cultural Characteristics of the Digital Enterprise

As companies assess their efforts to date, it's becoming clear that they can no longer ignore the culture problem. "We're hitting an interesting moment. Everyone went for the technology first and process second. And now these very, very large investments they made are getting slowed down or entirely stopped," says Swift. "Now they're getting to the part that should have come first—the cultural piece. They can spend all the money in the world on technology, but if people aren't going to work differently, it's not going to happen."

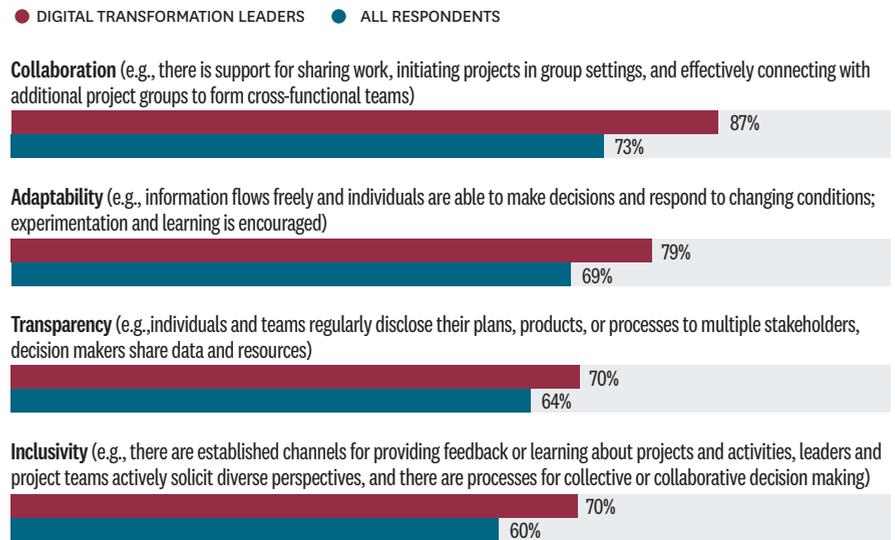
Companies are clear about what the most important characteristics of digital transformation are. When asked to rank the importance of four foundational principles for the digitally transformed enterprise, respondents rated having a culture of collaboration—where there is support for sharing work, initiating projects in group settings, and creating cross-functional teams—most important, followed by adaptability, transparency, and inclusivity. Even greater numbers of digital transformation leaders said each of these characteristics were key to digital change. [FIGURE 3](#)

However, only around a quarter to nearly a third of the overall respondent base rated their cultures highly in these respects. The digital

FIGURE 3

KEY CULTURAL CHARACTERISTICS OF DIGITAL TRANSFORMATION

Percentage of respondents who said each of the following cultural characteristics was very important in enabling digital transformation in their organizations

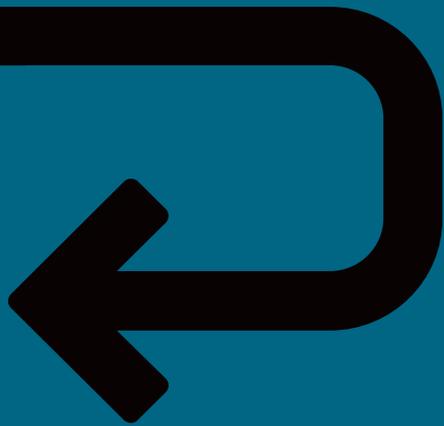


SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

transformation leaders were more likely to exhibit these cultural characteristics with more than half rating themselves as possessing the four characteristics to a great extent (8-10 on a scale of 1-10). [FIGURE 4](#) The culture of most organizations stands in direct opposition to digital transformation. "If you walk into any organization, there's a long list of things—how we develop leaders, how we structure rewards, how we set up KPIs—that are not only not helpful to digital transformation, but also directly impede it," says Swift.

Companies in need of transformation may lack the mindsets that have made digital leaders like Amazon, Facebook, or Google excel. "In legacy organizations, leaders don't have an entrepreneurial mindset. They want to meet their deadlines and schedules and do good work, but they're not looking at the big picture," says Dion Hinchcliffe, vice president and principal analyst with Constellation Research. A continuous learning mindset is also critical to building an adaptable culture and

THE CULTURE OF MOST ORGANIZATIONS STANDS IN DIRECT OPPOSITION TO DIGITAL TRANSFORMATION.



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MELISSA SWIFT, SENIOR CLIENT PARTNER,
KORN FERRY

organization. That requires embracing experimentation and learning from what works. “It’s imperative to foster a culture of failure, because you learn from mistakes,” Adobe vice president and CIO Cynthia Stoddard has said. “If your rate of failure isn’t high enough, that means you’re not really pushing yourself or your team hard enough.”

Empowering Digital Cultural Changes

When it comes to moving a culture in these directions—toward greater collaboration, adaptability, transparency, and inclusivity—“motivation matters,” says Hinchcliffe. “If rewards are clearer, it works,” he says. “It’s one of the leading factors in successful change. You need smart people thinking about how to create rewards for change.”

Part of the problem is that there is no blueprint for transforming a traditional culture into a digital one. “It’s easy to spend money on technology. It’s somewhat more difficult to change a business process. But culture is the hardest,” says Davenport. “There is no methodology for creating a data-driven culture. It requires a lot of senior management intervention and focus.”

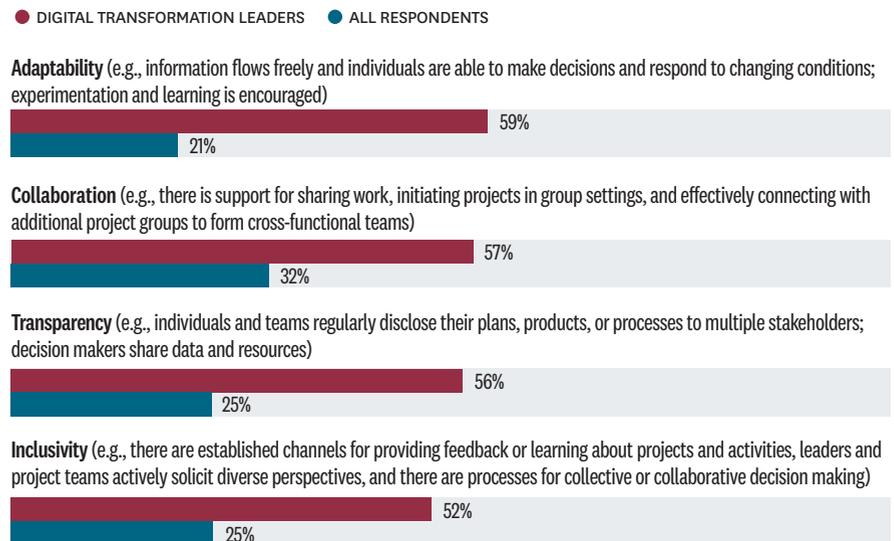
One place to begin is with an inventory of how things work in the existing organization, says Swift. “That means looking at everything from how you hire people and how you choose people to work for your organization, to what you reward people for.” For many years, companies hired people for being good operators. Now, they need skilled innovators. But there’s little in the existing organizational structure to support that fundamental shift. “The contemporary organization has been optimized to the nth degree; it’s been all about taking failure out of the equation,” says Swift. “As you move along this digital journey and need to do more experimentation, you’ll see that requires a direct reversal of behaviors and structures.”

Effective digital transformation begins with “a very strong vision of how you’re going to be a very different company,” says Westerman. “Once

FIGURE 4

DIGITAL LEADERS MAKE MORE CULTURAL CHANGES

To what extent does your organization possess these cultural characteristics?



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

that vision is well communicated, the second step is to make those changes happen by creating a culture that’s more collaborative, more data-driven, more experimental.”

Companies can’t make these cultural changes all at once, but can go after the most important ones and work from there. “Culture is not one thing. It’s a lot of different levers,” says Swift. “You can look for what’s having the biggest impact on how people behave, whether that’s the organizational structure or the rewards system, and train your sights on that.”

The Agile Engine That Powers Transformation

When it comes to the process changes that enable digital transformation, more than half of respondents indicated that continuous integration/continuous delivery (CI/CD), agile development and project management processes, and DevOps were critical. [FIGURE 5](#)

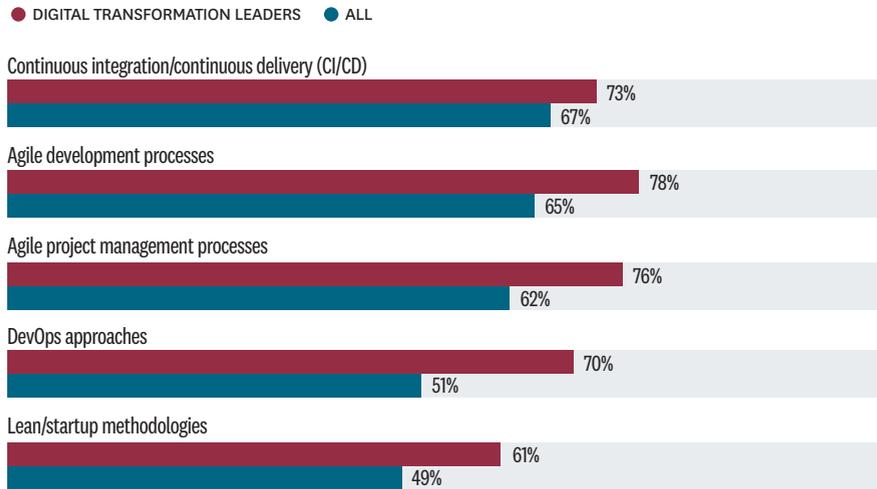
A significant number of respondents said that they had implemented agile

PART OF THE PROBLEM IS THAT THERE IS NO BLUEPRINT FOR TRANSFORMING A TRADITIONAL CULTURE INTO A DIGITAL ONE.

FIGURE 5

PROCESS ENABLERS OF DIGITAL TRANSFORMATION

Percentage who said the following process changes were very important to enabling digital transformation

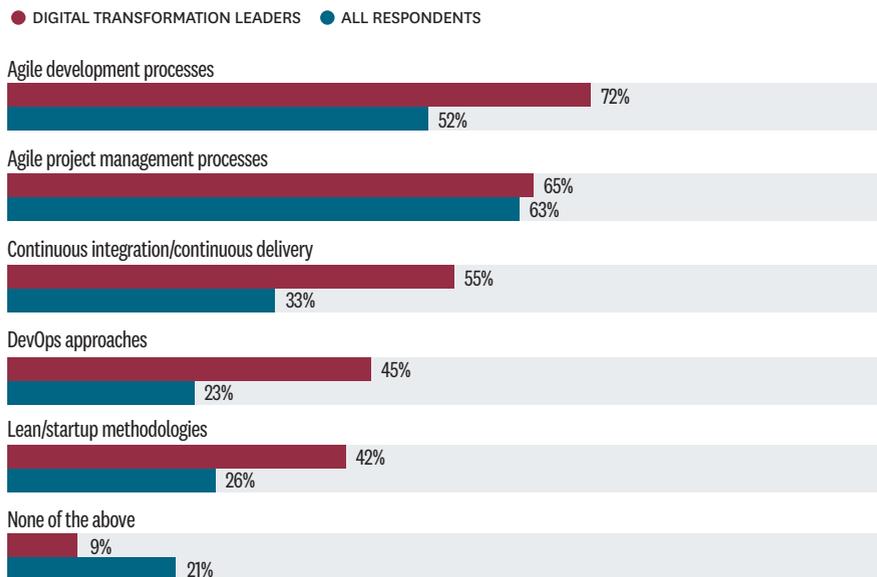


SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

FIGURE 6

DIGITAL LEADERS EMBRACE NEW AGILE PROCESSES

Percentage of respondents who said they had implemented the following process changes to enable digital transformation



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

methods, but fewer had adopted DevOps and CI/CD. The digital leaders were much more likely to have implemented these process changes. [FIGURE 6](#)

“Agile, DevOps, and lean methodologies make a difference in digital transformation,” says Hinchcliffe. “A lot of these processes work by experimenting quickly, building working software as fast as you can put it in front of the customer, learning from that, and building the right thing.” Zack Hicks, chief digital officer and CIO of Toyota North America has said agile means “delivering only what the customer asks and no more [a minimally viable product, or MVP], then hearing what customers like or don’t like and building that into the next iteration of the product.”

One of the biggest complaints business executives seeking digital transformation have about IT is that it’s too slow. Agile can be part of the solution to that. It helps if agile approaches are embraced not just by IT, but by the rest of the business as well. “In truly agile organizations, project leaders on the ground are authorized to make big decisions about their products,” Hinchcliffe says. “Agile breaks down when you integrate it with traditional project or program management programs that still exist in most big companies. Unless you invest in agile up to the leadership level, you don’t get the full benefit.”

The nearly half of respondents who have yet to adopt agile development approaches and an even greater portion who have failed to adopt agile project management are “already late to the game,” says Westerman. The entire organization doesn’t have to embrace agile all at once, but beginning with IT is a good start. “When agile IT is working well, you will find business people to collaborate with, and from those people have stories you can share with others to gain traction and branch out.” AT&T, for example, has expanded its agile methods throughout the organization with the goal to increase speed to

market by 45% over two years. A year into its efforts, it had already seen a 37% increase.

From there, DevOps—the integration of application development and operations teams—is the method by which these agile approaches are extended to operational teams. “You can’t leave them out if you want to make these digital systems manageable, operational, and secure,” says Hinchcliffe. Walmart is one of many companies whose IT organization has adopted DevOps to speed up application delivery and improve quality.

The Technology Capabilities of the Digital Enterprise

When it comes to technology capabilities, nearly three quarters of respondents said the ability to respond rapidly to customer demands was very important to their digital transformation, followed by updating systems efficiently, developing and delivering new applications quickly, and controlling operational costs in order to devote more budget to innovation. These numbers are even higher for digital transformation leaders. [FIGURE 7](#)

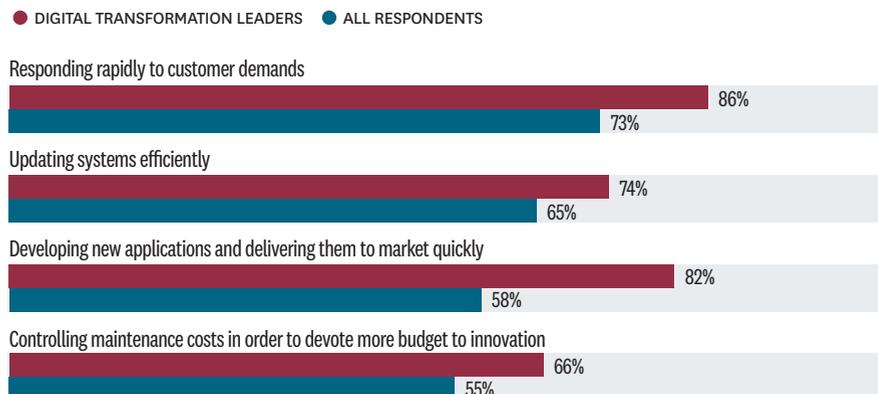
However, a quarter or less rate their infrastructure and application architecture highly in enabling these capabilities, while more than half of digital transformation leaders said their IT architectures were capable of enabling these capabilities. [FIGURE 8](#)

The gap between the technology goals organizations have for their digital transformation initiatives and their current capabilities can be partially explained by their cultural and process inertia. But it’s more than that, says Hinchcliffe. “It’s very expensive to create new digital products and services. And once most companies have them up and running, they take their A teams off and put a maintenance team to keep them up and running far more cheaply.” That results in digital systems that fail to evolve and improve over time, which is critical to responding rapidly to customer demands.

FIGURE 7

TECHNOLOGY CAPABILITIES OF DIGITAL TRANSFORMATION

Percentage of respondents who said the following technology capabilities were very important to their organization’s digital transformation efforts

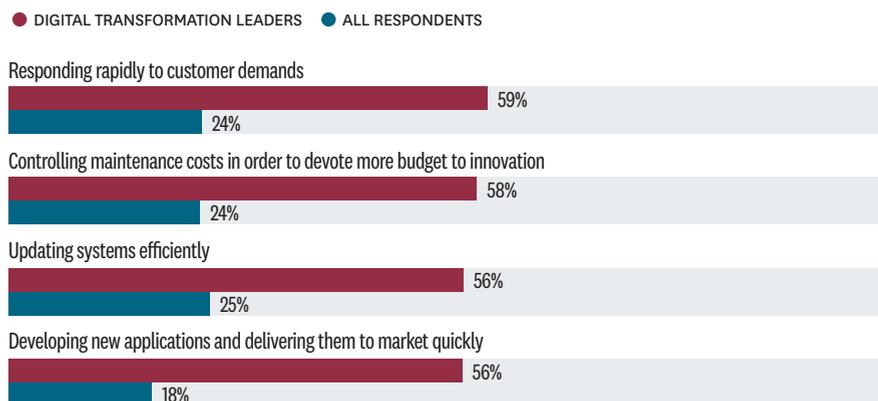


SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

FIGURE 8

THE STATE OF INFRASTRUCTURE AND APPLICATION ARCHITECTURE

Percentage of respondents who said their current infrastructure and application architecture is very effective in providing a foundation for the following capabilities



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

IT HELPS IF AGILE APPROACHES ARE EMBRACED NOT JUST BY IT, BUT BY THE REST OF THE BUSINESS AS WELL.

“In the industrial era of business, we were much more concerned with efficiency than with growth, and too many companies are still living in that world where they are solely focused on driving down costs,” Hinchcliffe says. “They need to adopt a model of continuous improvement.” Some of this may be solved with a greater embrace of digital culture shifts and process improvements.

Investing appropriately in IT is also critical. “Most companies have flat IT budgets that barely keep pace with inflation,” says Hinchcliffe. Digital leaders, on the other hand, tend to spend twice as much on IT and, as a result, respond to competitors better. “Legacy companies still view IT spending as overhead,” says Hinchcliffe. “They need to start thinking about IT as how we generate revenue. Until then, they will be underfunding technology and shortchanging the customer.”

Measuring Digital Transformation Success

For a fundamental—and disruptive—change like digital transformation, measuring progress is critical. In fact, all respondents were in agreement on the most effective key performance indicators. Leaders and laggards alike indicated that the best measures of digital transformation progress are customer retention and loyalty, growth and revenue generation, operational efficiency, employee retention, and cultural change metrics.

While 44% are looking at growth and revenue generation metrics and 39% at profitability numbers, most companies are failing to apply the very metrics they say would be most helpful in assessing their progress. Less than a third are monitoring operational efficiency—one of best and easiest categories of metrics to track, according to Westerman. While the majority of respondents cited customer retention and loyalty as the leading success metric, only 26% of respondents report that they’re currently using it. Despite the fact that companies say cultural hurdles are the biggest impediments to digital

change, fewer than 10% measure cultural change for the purposes of determining digital transformation success. [FIGURE 9](#)

Given the importance of culture to digital transformation, the fact that so few organizations are measuring cultural impact—even among digital leaders—is a problem. But it can be done. “Culture is an aggregate of behaviors and attitudes. Attitudes are fairly easily measured. Behaviors are a little bit harder, but you can evaluate them in performance measurements,” says Davenport. “You need to start doing that if you’re serious about digital transformation. If you really believe that digital behaviors and attitudes are going to drive your successful future, it makes sense to define and measure them.”

Digital transformation leaders were more likely to measure revenue growth, operational efficiency, market position, customer retention and loyalty, employee satisfaction, and new product and service innovation metrics to gauge their transformation progress. But even for these more successful organizations, there is significant room for improvement.

“We stink at measuring innovation right now,” says Swift, who points to ideation rate as a potentially effective gauge for organizations. “But there are not a lot of other metrics like it. Many things that are measurable actually push against innovation.”

It’s not surprising that there are not yet standard metrics for digital transformation. “We are not 100 years into the industrial revolution, we’re 12 years into the digital era,” Hinchcliffe says. “When I talk to boards and C-level leaders doing digital transformation, their top question is ‘What are my KPIs for this?’ The reality is that there are no standard metrics because it’s too early.”

However, organizations should not wait for such best practices to emerge because then it will be too late. Without metrics, leaders are “managing by the seat of their pants,” says Hinchcliffe. “They have a harder time prioritizing, they can’t shut down

failures or expand successes because they don't know. They need that lens."

Organizations that are committed to digital transformation can put some thought into creating a new measurement language for digital progress—particularly the more intangible, but often more important, aspects of it related to people and process. "If you look at the digital native companies, they're obsessed with measurement. It's an accelerant to digital progress," says Swift.

The Return on Digital Transformation

For all these reasons—the cultural, process, and technology shortfalls, as well as the lack of investment in coming up with new metrics for success—the benefits of digital transformation efforts to date have been limited for most respondents. A quarter have seen operational efficiency increase significantly, and around 20% have seen significant improvements in market position, revenue generation, customer retention and loyalty, and new product or service introduction.

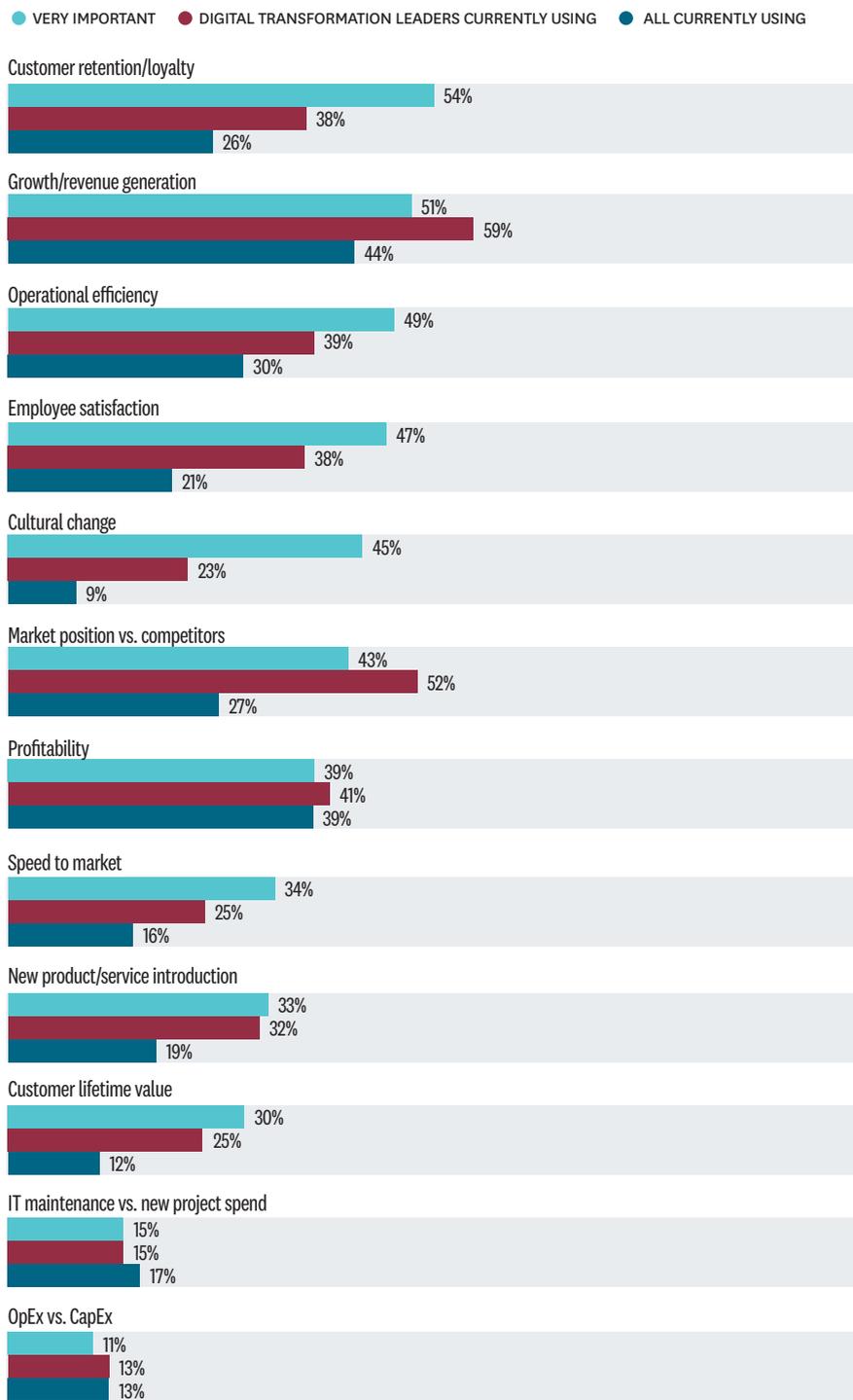
"Partly this is because most companies haven't clearly identified digital transformation as a real change process," says Davenport. "They talk about being digital, but there's no clarity about what it means and how it is different than what we've been doing for the last 20 years." Indeed, in recent years, several high-profile companies that put significant investments into digital transformation, such as GE, Procter & Gamble, and Nike, have made cutbacks in their efforts after not achieving the returns they had anticipated. "In many cases, it's all too vague with no clear priorities," says Davenport. "Organizations either need to drop it or get serious about it, getting more targeted in their efforts and being able to measure their progress."

A greater percentage of digital transformation leaders, on the other hand, are reporting significant returns in the areas of market position, revenue growth, operational efficiency, employee satisfaction, new product

FIGURE 9

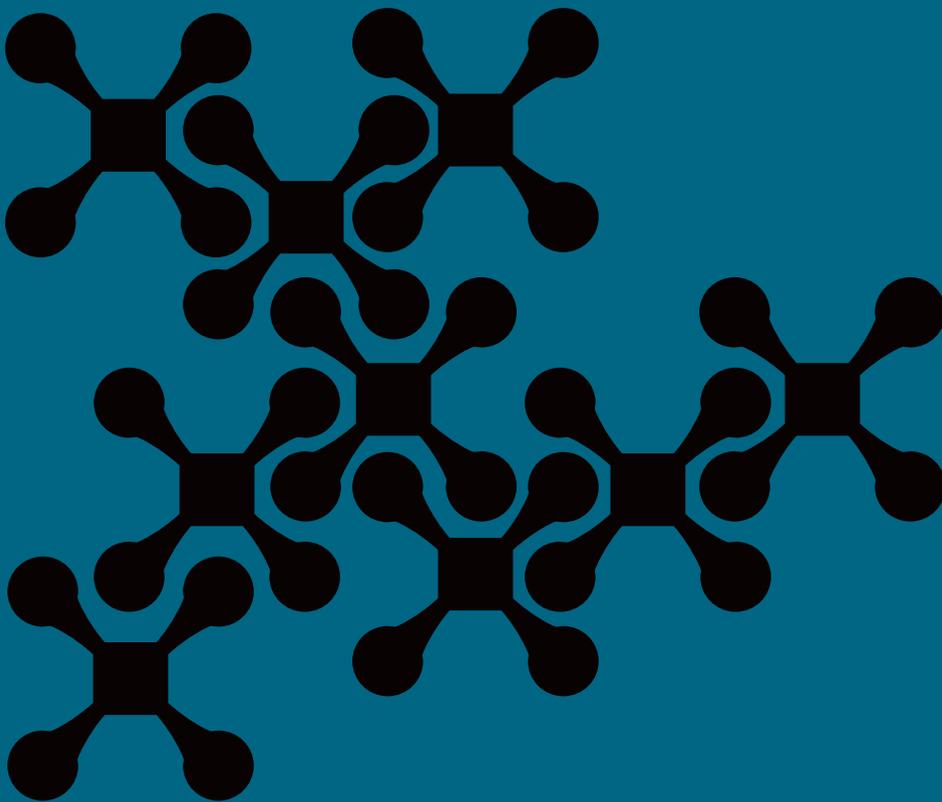
DIGITAL TRANSFORMATION METRICS

Percentage of respondents overall who said the following key performance indicators would be good measures of the success of digital transformation efforts, along with the percentage of overall respondents and digital transformation leaders who are currently using these metrics to measure their organization's digital transformation progress



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

“CULTURE IS AN AGGREGATE OF BEHAVIORS AND ATTITUDES. ATTITUDES ARE FAIRLY EASILY MEASURED. BEHAVIORS ARE A LITTLE BIT HARDER, BUT YOU CAN EVALUATE THEM IN PERFORMANCE MEASUREMENTS.” TOM DAVENPORT



“IF YOU LOOK AT THE DIGITAL NATIVE COMPANIES, THEY’RE OBSESSED WITH MEASUREMENT. IT’S AN ACCELERANT TO DIGITAL PROGRESS,” SAYS SWIFT.

and service introduction, and customer retention and loyalty. **FIGURE 10**

These digital transformation leaders, faced with the very same cultural, process, and technology impediments as everyone else, identified key cultural, process, and technology shifts that would need to happen to begin their digital shifts. They have been able to build cultures that are more collaborative, adaptable, and transparent. They are convinced that agile processes will deliver the types of new systems and processes to enable the capabilities they seek, like meeting customer needs.

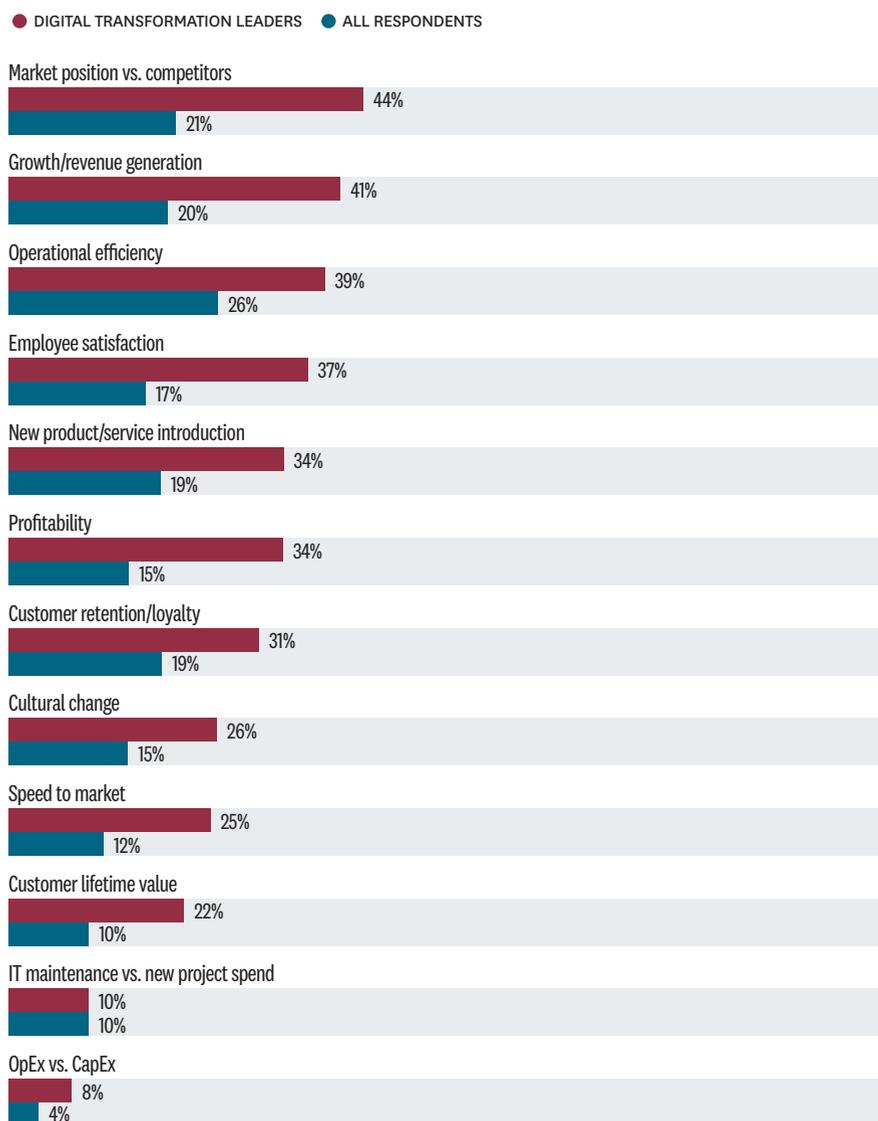
These more successful organizations still have work to do, and they, too, will face continued challenges as they move forward. But they are on the right path. “You can’t change technology without changing people,” says Hinchcliffe. “Technology and culture change go hand in hand. And when they do, it’s far easier. In higher-performing organizations, culture change and technology change are orchestrated together.” And those digital transformation leaders are beginning to be rewarded for it.

That’s instructive for the rest of the organizations seeking to improve their digital transformation efforts. By making a commitment to not just throw money at new technology solutions, but to also create more inclusive, adaptive, and collaborative cultures; to expand the use of processes like agile and DevOps approaches; and to put the right infrastructure in place to support the goals of digital transformation, they can begin to see similar benefits.

FIGURE 10

DIGITAL TRANSFORMATION RESULTS

Percentage of respondents who said the following measures of corporate performance have improved significantly as a result of their organization’s digital transformation efforts



SOURCE: HARVARD BUSINESS REVIEW ANALYTIC SERVICES SURVEY, JULY 2018

METHODOLOGY AND PARTICIPANT PROFILE

A total of 734 respondents drawn from the HBR audience of readers (magazine/ newsletter readers, customers, HBR.org users) completed the survey.

SIZE OF ORGANIZATION

42% 10,000 OR MORE EMPLOYEES	30% 1,000-9,999 EMPLOYEES	9% 500-999 EMPLOYEES	19% 499 AND FEWER EMPLOYEES
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SENIORITY

26% EXECUTIVE MANAGEMENT/ BOARD MEMBERS	38% SENIOR MANAGEMENT	21% MIDDLE MANAGERS	15% OTHER LEVELS
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KEY INDUSTRY SECTORS

13% TECHNOLOGY	12% FINANCIAL SERVICES	10% MANUFACTURING	8% OR LESS OTHER SECTORS
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JOB FUNCTION

26% GENERAL/EXECUTIVE MANAGEMENT	9% MARKETING/PR/ COMMUNICATIONS	8% OR LESS OTHER FUNCTIONS
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REGIONS

44% NORTH AMERICA	21% EUROPE	21% ASIA/PACIFIC	7% SOUTH/CENTRAL AMERICA	5% MIDDLE EAST/ AFRICA	2% REST OF WORLD
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Figures may not add up to 100% due to rounding.



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