

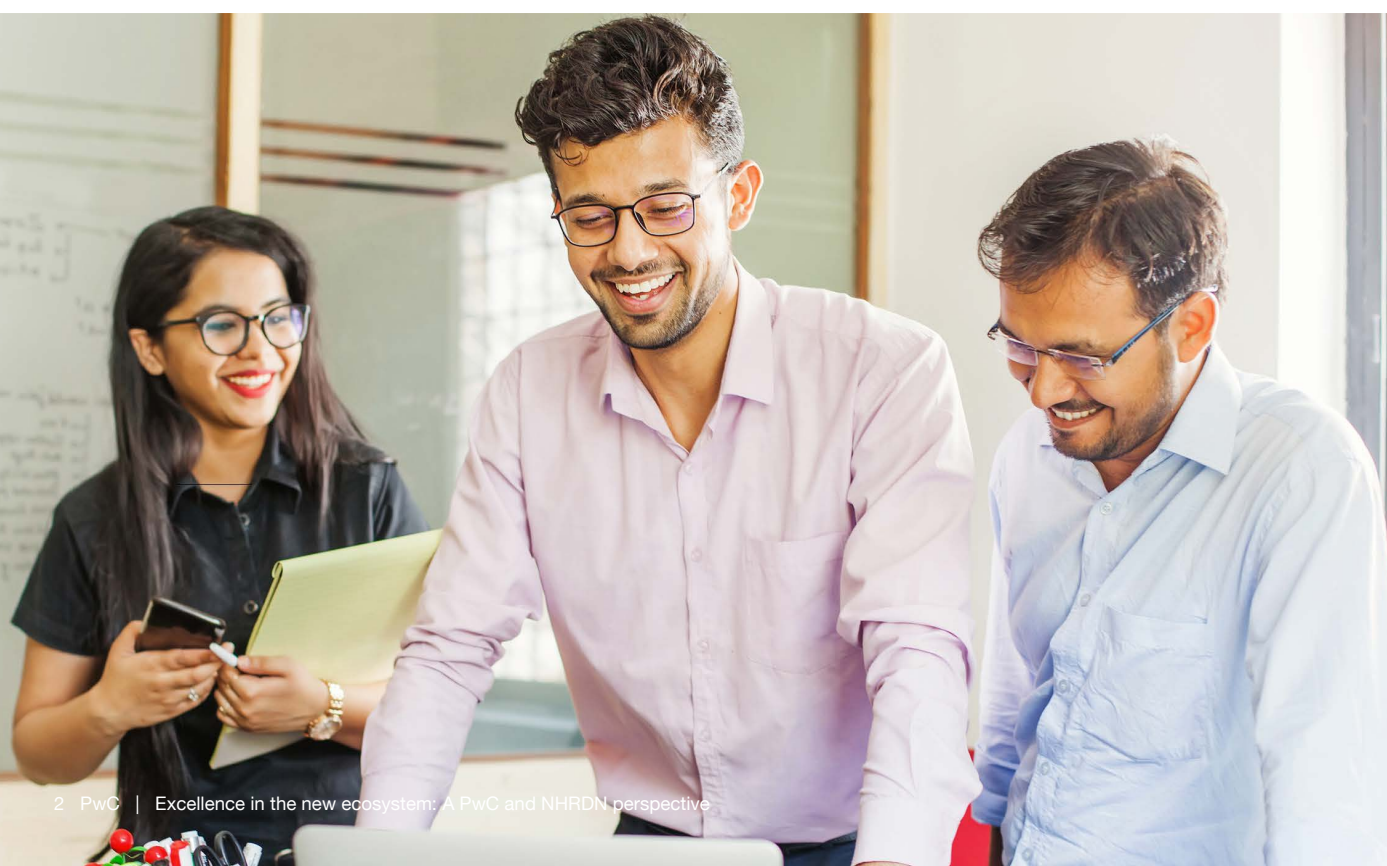
# Excellence in the new ecosystem

**A PwC and NHRDN  
perspective**



# Table of contents

1.	Foreword:	
	Message from PwC .....	3
	Messages from NHRDN .....	4
2.	Executive summary .....	6
3.	The burning need .....	9
4.	Shifting paradigms of future of work and role of HR .....	12
5.	Excellence in organisational design .....	16
6.	Excellence in organisational capability .....	27
7.	Excellence in organisational culture .....	37
8.	Way forward.....	47
	Appendix .....	50



## Section 1: Foreword

### Message from PwC

The ongoing pandemic can be viewed as a great leveller, with 1.35 billion Indians having been brought together by a series of nationalised lockdowns and safety guidelines. This was also a shared experience that reminded organisations across industries of the need to partner with each other in order to drive value. For organisations, this new ecosystem has meant protecting their people/assets, embedding sustainability and driving business continuity. And HR was at the front and centre of this people-first response.

In such times, it is imperative that we address the big shifts across work, the workplace and workforce to help businesses navigate this new normal. In the past, organisations were thinking about the new ways of working, but the COVID-19 crisis has made the shift to a new platform and the development of new ways of working a burning need. The workplace will neither be what it was nor remain what it has become in the current circumstances. The new workplace will have to be more mature and inclusive that considers the needs of the organisation, provides employees with the right human experiences and balances the employee-employer relationship. Our joint report with the National HRD Network (NHRDN) reveals the important considerations for organisations across industries to emerge stronger from the crisis in terms of the operating realities that are shaping the ecosystem. It also delves into the paradigms of the future of work and its implications for HR professionals.

As organisations change their business models and accelerate technology enablement, the need to redefine organisational design, jobs to be done and how they should be done in order to balance productivity, performance and workplace considerations will assume greater importance. Reimagining the factory/in-person set-up as a virtual/hybrid and/or less-contact one in order to create a dynamic, distributed and inclusive workplace will also be a key future consideration.

These changing needs will require leaders and people at large within the organisations to focus on the capabilities that enable them to get future ready simultaneously. The interdependence of organisations and leadership capabilities in the future and the ability to navigate this maze of capability will be critical to their success.

Leaders are under tremendous pressure and organisations have been forced to adapt to the changes. The organisational reflexes will be the result of their collective choices and that is essentially how the new cultural mechanisms will be forged. The urgent need of the future is to reinvent organisational culture to meet the new business strategy and organisational design, adapt emotional and cultural drivers, reimagine the organisation's purpose, focus on the evolving employee expectations, and shape a future office that is conducive to engagement.

This report aims to map the emerging possibilities in the new world of work across the three factors mentioned above – organisational design, its leadership, and people capability and culture.

“ The new way of working will, to a great extent, redefine what people have done and how they have done it. As employees need to take the workplace to their homes, a complete rethink of policies and employee experience may be necessary.



**Chaitali Mukherjee**

Partner and Leader, People and Organisation, and India Upskilling Leader  
PwC India

# Messages from NHRDN

This is a big inflection point for businesses and organisations. We have all been disrupted by change – in technology, automation, globalisation and de-globalisation – especially over the last couple of years. Now, the pandemic has jolted us out of our apparent inertia! It has accelerated many changes and also transformed some of our core beliefs about work and life. Clearly, this is an opportunity for us to rethink and reset.

But instead of jumping on the ‘groupthink’ bandwagon, we wanted to dig a bit deeper and carried out this research in partnership with PwC. What are the changes on the ground? What are HR leaders actually seeing? What are some of the early clues about the direction we should focus on? What seems to be working? This is what we have put together – a clear agenda that is emerging as we deal with this pandemic.

The whole ecosystem of work and business will undergo a big shift. How we adapt to and shape this shift will determine the success of our businesses. We believe this paper paints a useful picture of our new priorities and will help us in our journey.

NHRDN will continue to partner with you in the future.

Thanking you,



**Krish Shankar**

Group Head – Human Resources at Infosys, and  
Honourable President of National HRD Network, India

When we were conceptualising this conference on 'Excellence in the new ecosystem', we began thinking about the term 'excellence' and what it would mean in the new ecosystem. We concluded that good enough is dead given that this is one of the most transformational time in human history. In a world where everything is connected, the expectation of performance excellence in organisations is driven by external factors. While acknowledging the existence of these factors, organisations have now begun to focus more on their impact on internal levers. To address these key points, we decided to look at organisational design, leadership and culture – all of which will play a major role in creating excellence in the new ecosystem.

This joint report by PwC India and the National HRD Network (NHRDN) is an attempt to chart a path towards a better future for CEOs, CXOs, HR practitioners and thought leaders. The voices of the leaders captured in this report will be of immense value to the industry in navigating the future.

The COVID-19 crisis has made organisational redesign and alignment with a redefined organisational culture an imperative for business leaders. A few organisations sensed this need early and have already started working towards these goals. Too often, though, organisations assume that everyone shares the same definitions of broad terms like vision, loyalty, accountability, customer relationships, teamwork, focus, priority, culture, frugality, decision making, culture and results. In a D-VUCA-D world, simple and new operating definitions are necessary in order to help us reimagine the future. Organisations need to be very clear about where they are and where they want to go, with key milestones defined to achieve the desired impact on design, leadership and culture.

We are all aware that the workplace, workforce and the nature of work itself are rapidly transforming, and the three levers of design, leadership and culture need to come together to create a different employee and customer experience. This report focuses on the future trends with respect to these levers in major sectors, and attempts to answer the why, what and how for creating excellence in the new ecosystem.

I would like to thank PwC and NHRDN, along with the leaders of many organisations, who came together to prepare this report and organise this conference.



**J. Ravikanth Reddy**  
Founder and CEO, PQuest and Conference Director



## Section 2

# Executive summary

The current pandemic is one of the biggest global health crises that the world has faced since World War II. It has also resulted in an economic recession that did not originate in the financial system. The Indian economy is now entering its first recession since 1979, with a GDP contraction of 23.9% over the same quarter in the last fiscal. Every citizen, young or old, rich or poor, and from every region of the country experienced the disruption caused by a national lockdown at first hand.

An unseen and unknown adversary has united all the players of our society. They are now compelled to alter their priorities and take immediate measures in the short term. It also has given them an opportunity to rethink business models, redeploy their workforce, regain control over financial and operational continuity, redefine productivity, and develop new products/service offerings to meet the changing customer demands in a very short span of time.

Our report 'Excellence in the new ecosystem' highlights the trends, key insights and best practices on the three critical levers – organisational design, capability and culture – which will help leaders to support their organisations to not only thrive but also future-proof their business. This report brings together the views and perspectives shared by board members, CEOs, CHROs across industry sectors and PwC industry experts.

## Shifting paradigms of the future of work and role of HR

Big shifts are taking place in our macro environment and the pandemic is affecting our ways of working. This calls for a paradigm shift in our workplace, workforce and work. However, these shifts are not possible in the true sense – at best incremental changes would be possible until we build and embed the organisational capabilities of agility, resilience and an ecosystem mindset into the organisational design, capability and culture. It's also important for HR to reinvent its role or reconsider its priorities to enable not just organisations but also the ecosystem to collaborate and drive inclusive growth.

## Excellence in organisational design

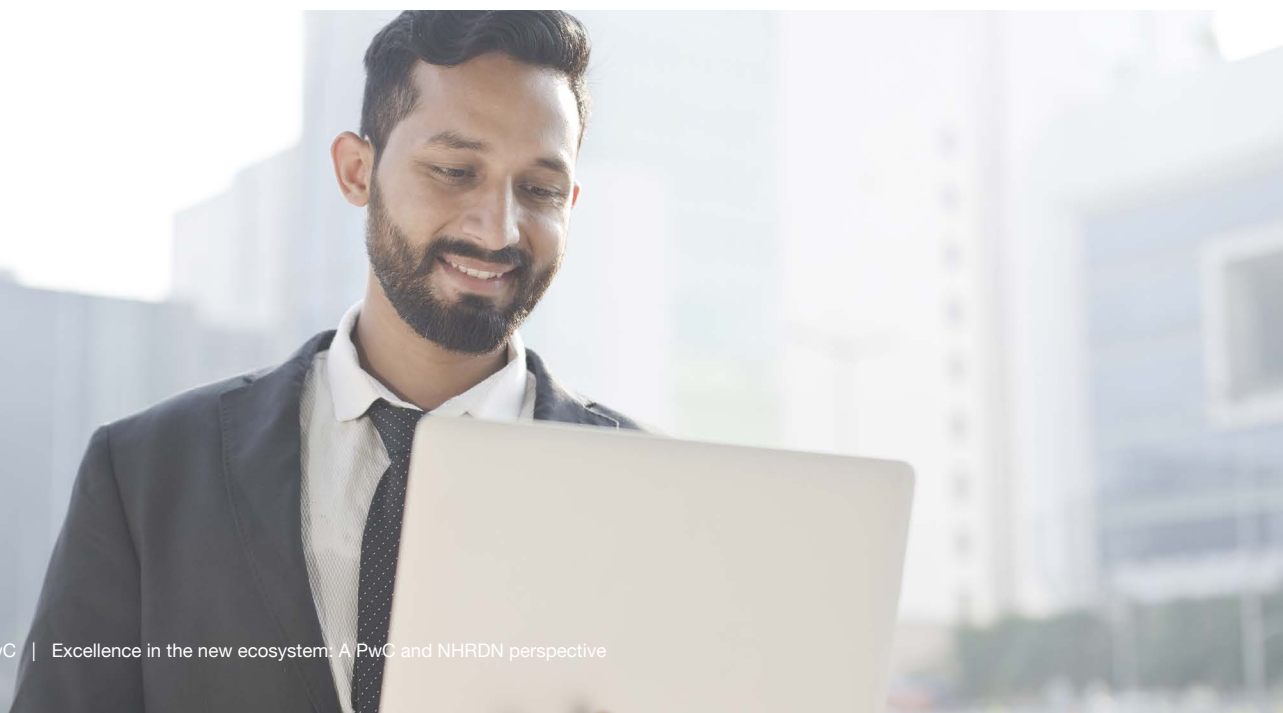
While organisations are changing their business model, a corresponding change is required in the way organisations structure and deploy a fit-for-future workforce. Our survey revealed that 59% of the respondents anticipate the biggest shifts in their operating model and organisation structure in the future. A common theme in our conversations and our own practice is the need for organisations to widen and deepen their operating model for more decentralisation of decision making. Some of the key considerations for leaders to explore are (1) move to a hybrid workforce model, (2) revisit the employment models and employment contracts, (3) localise select operations, (4) offshore select operations and (5) manage employee productivity in a hybrid workforce model.

## Excellence in organisational capability

Even before the COVID-19 pandemic, CEOs were concerned about finding, keeping and developing the talent needed for the future of work. The crisis has added greater thrust to this agenda. Our survey suggests that leaders have a clear preference for upskilling employees to bridge the capability gap arising due to changes in operating models and technological disruption. This is also a 'crucible' period from which the true capabilities of leaders emerge, and reputations are forged. Successful leaders today must embody and negotiate a set of apparent contradictions in order to thrive in a rapidly changing world.

## Excellence in organisational culture

Holding together or restitching the organisation's cultural fabric to accommodate the changing nature of the workforce while maintaining a seamless and uniform cultural experience for all employees is a puzzle that HR leaders have to solve. Today, sustaining employee engagement is a major challenge for most leaders. This, we believe, is possible through a clear focus on driving employee experience and building a strong foundation of organisational culture. Our data shows that flexibility, work from home and health and well-being are the top three emerging employee expectations and initiatives organisations are driving. In our interviews, leaders expressed a strong desire to implement bite-sized initiatives to build an inclusive, agile and resilient culture.





**59%** of the survey respondents believe that operating models and organisational structure will see the biggest shift in the future.



Digital skills like data-driven decision making, analytics and human-centric skills like emotional intelligence, resilience, empathy and trust are gaining precedence.



Distributed and whole leadership are emerging as new leadership paradigms.



**25%** of the survey respondents believe that the workforce will see a permanent shift and move to a work from anywhere model.



**67%** of the survey respondents feel that productivity will increase or remain the same. **33%** feel that employee productivity has reduced.



Leaders are striving to build a dynamic, distributed and inclusive organisation design quickly.



**52%** of the survey respondents feel that their degree of agility with respect to changing their operating model and organisational structure with ease and without disruption is low.



**42%** of the survey respondents rank flexibility as the top priority under emerging employee expectations. For 20%, it is work from home. For 19%, it is health and well-being.



**78%** of the survey respondents feel that their ability to maintain a 'customer-first' approach and provide a positive customer experience as per changing needs is high.



Disruptive envisioning, multidimensional sense-making and an institution-building mindset based on personal credibility are the top leadership skills in demand.



Interdependence of organisations, the Government and industry bodies has increased.



Well-being lies at the centre of employee experience.



HR is set to be a catalyst for disruptive change.





## Section 3

# The burning need

### 3.1 Defining the new ecosystem

Change is happening now. India and its 1.35 billion citizens continue to confront multidimensional challenges across the political, economic and social spheres. The varying response of organisations within the new ecosystem will decide the extent of the impact of this COVID-19 crisis on the nation and how the future will be transformed. The ability of organisations to respond to this crisis will depend on how their structure is redefined to meet the needs of business, how their leaders and people become future ready and how the cultural mechanisms are reshaped. Organisations may not be able to respond by being unipolar and should aim to drive excellence in the ecosystem through a network of diverse capabilities that will help unlock the full spectrum of their potential. This is also the key to the nation's growth. Hence, today, we are looking at the new realities that have shaped the business ecosystem across **organisational design**, **organisational capability** and **organisational culture**.



A unique crisis demands a unique response in terms of size, speed and scope through the combined efforts of organisations. We observed immediate collaboration between organisations and the government during the early days of the lockdown, with several organisations coming forward to pledge support in the fight against COVID-19. A large mining company set up a dedicated INR 100 crore fund to support the Government of India in fighting the crisis. A leading vehicle manufacturing company manufactured ventilators in its own factories and its chairman offered 100% of his salary to support the COVID-19 response.<sup>1</sup> Another marquee technology organisation helped the Government of Punjab roll out COVA, a citizen application that offers real-time and reliable information on the COVID-19 pandemic.<sup>2</sup> A state-run telecom firm also offered double data on all landline and mobile broadband plans for a month in Delhi and Mumbai to help people work from home during the crisis.<sup>3</sup> Industry bodies are also building specialised capabilities to help workers become self-reliant and find the right career opportunities, especially at a time when one in four employees in India has lost their jobs during this crisis.<sup>4</sup>

From an organisation's perspective, these uncertain times require immediate and long-term 'people-first' responses. This puts HR leaders at the centre of an organisation's crisis response as businesses need to re-evaluate their core assumptions on operating models, capability building and cultural practices that worked well in the pre-COVID era.

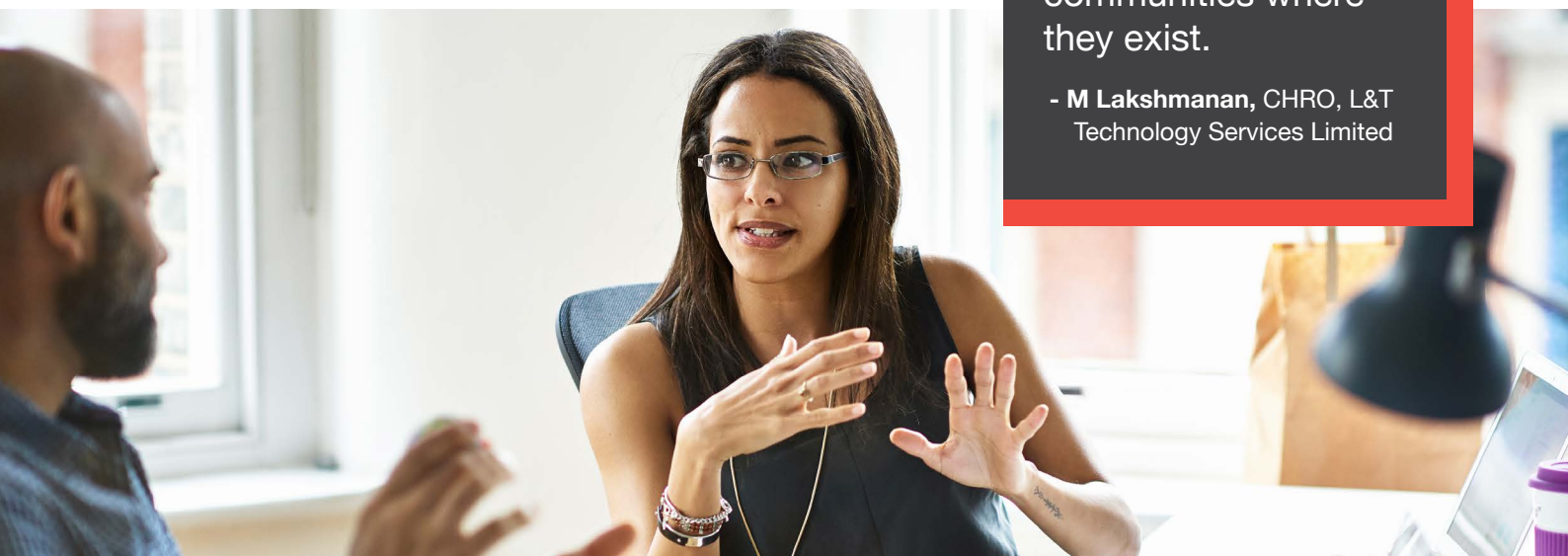
## Leader perspectives

While we have identified the three factors driving excellence in the new ecosystem, industry bodies and government play an equally important role in supporting organisations along this journey.



The single biggest ask of leaders is to build a 'circle of trust' where they are able to empathise with their employees, leaders, partners/vendors and communities where they exist.

- M Lakshmanan, CHRO, L&T Technology Services Limited



1. <https://economictimes.indiatimes.com/news/company/corporate-trends/anand-mahindra-to-offer-100-salary-to-deal-with-coronavirus/articleshow/74758456.cms?from=mdr>
2. <https://timesofindia.indiatimes.com/gadgets-news/supporting-government-organisations-and-healthcare-sector-in-india-microsoft/articleshow/75185181.cms>
3. [https://www.business-standard.com/article/companies/mtnl-offers-to-double-data-in-broadband-plans-help-in-coronavirus-crisis-120032200203\\_1.html](https://www.business-standard.com/article/companies/mtnl-offers-to-double-data-in-broadband-plans-help-in-coronavirus-crisis-120032200203_1.html)
4. Centre for Monitoring Indian Economy (CMIE)

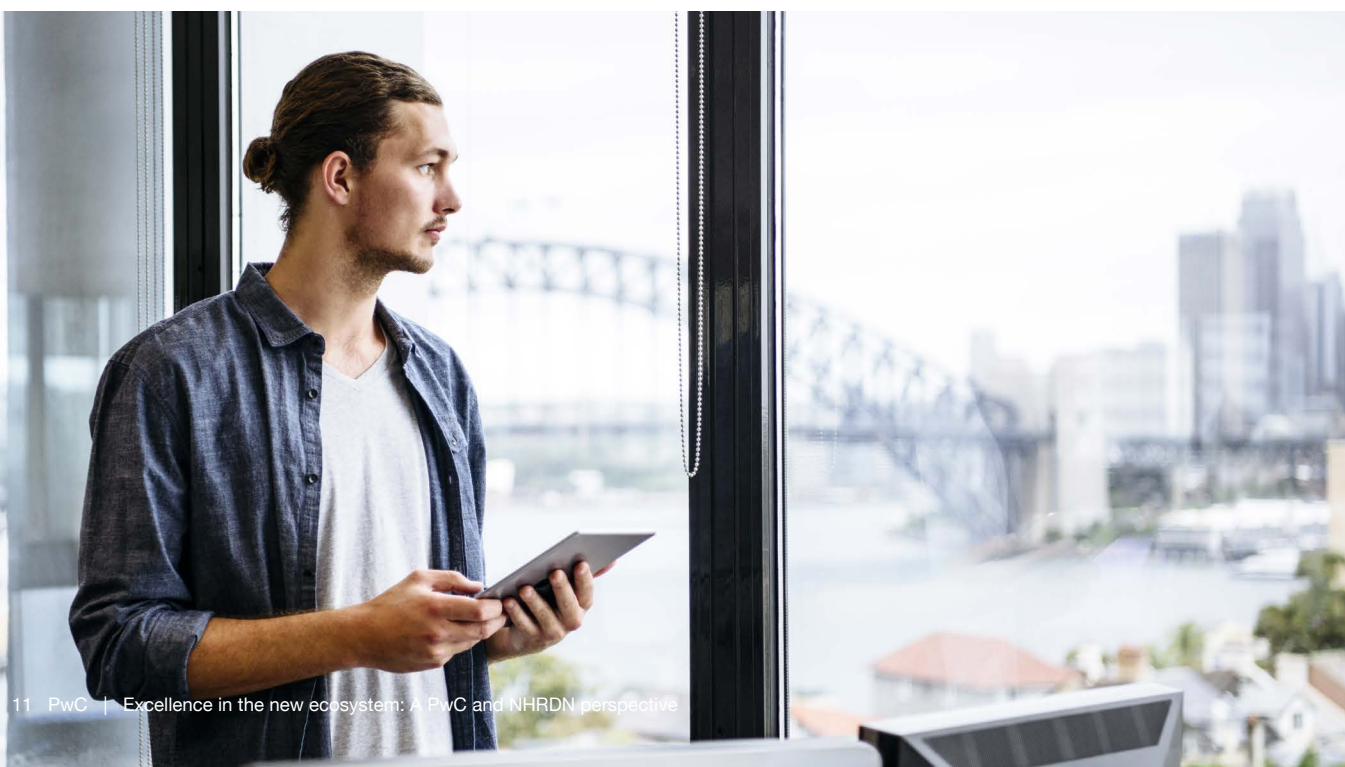
## 3.2 Objective of this study

This study aims to present insights and best practices that organisations can adopt in order to thrive in the new ecosystem by harnessing the power of association. The discussion thus far suggests that organisations must harness the power of association, build a more dynamic workplace, and design the ‘human experience’ that is right for their workforce. This study aims to address the challenges that organisations are grappling with in this new ecosystem:

- 1 How can organisational design support the business dynamics of the future?
- 2 Which emerging organisational capabilities are critical for success in the future of work?
- 3 Which paradigms of culture and engagement do we need to rewrite?

## 3.3 Research methodology

The industry experiences and perspectives have been crafted based on inputs from:





## Section 4:

# Shifting paradigms of future of work and role of HR

As we look at the interplay and interdependencies between organisational design, capability and culture, two fundamental considerations become apparent for organisations across industries to emerge stronger:

1. What are the changing paradigms of the world of work?
2. What are the implications of the future of work characteristics for HR professionals?

## 4.1 The changing business paradigms of the world of work

The world of work is being shaped by the current and medium-term operating realities in India as well as global phenomena. This turbulent period is a one-time opportunity for organisations to prepare for a fast-arriving future by mapping the emerging possibilities, urgent challenges and needs of people. Based on conversations with board members, CEOs and CHROs across industries and our survey, we have highlighted the big shifts and changing priorities. It would be naive to say that these are new shifts, but they are clearly more pronounced today and have been intensified by the present crisis.

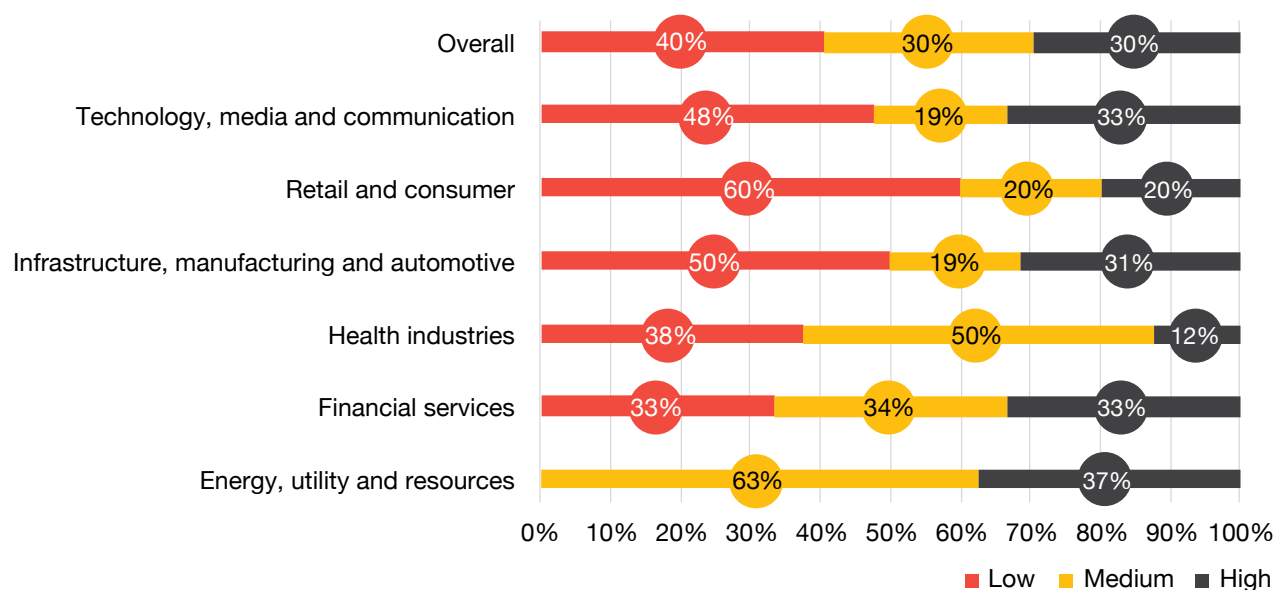
## Leader perspectives

Sector	Top three business shifts	Key reflections
<b>Financial services</b>	<ul style="list-style-type: none"> <li>Shift towards privatisation of banks and subsidiary model</li> <li>Hyper-personalisation due to the changing customer profile</li> <li>Building IT infrastructure and data security to secure business transactions</li> </ul>	Trust and integrity are cornerstones to doing business in the virtual world.
<b>Health industries</b>	<ul style="list-style-type: none"> <li>Increased localisation/repatriation of API manufacturing and supply chain</li> <li>Emergence of telemedicine and contactless customer engagement</li> <li>Competition from e-commerce platforms catering to digital-savvy customers</li> </ul>	Corporates will play an important role in the Government's efforts to ramp up our medical infrastructure.
<b>Technology, media and communication</b>	<ul style="list-style-type: none"> <li>Market play will increase due to greater investments in technology</li> <li>Extreme offshoring to operate virtually, resulting in reduction of cost to customer</li> <li>Shutdown by global end customers across sectors to have a significant effect on Indian IT exports</li> </ul>	Several initiatives like remote work, online customer support and data security have been fast-tracked.
<b>Infrastructure, manufacturing and automotive</b>	<ul style="list-style-type: none"> <li>Increased focus on automation to increase quality, decrease turnaround times and reduce human intervention</li> <li>Movement of support and corporate functions like procurement, finance, human resources and logistics to a remote working regime</li> <li>Reduced physicality of management as well as digitised decision making</li> </ul>	There has been a rise in the number of projects in light of the proactive move by the Government. However, executing projects timely and maintaining healthy cash flow by bringing back migrant workforce continues to remain a focus area.
<b>Retail and consumer</b>	<ul style="list-style-type: none"> <li>Increase in focus and dependence on set-up of e-commerce revenue model on account of buyer preferences</li> <li>Shift towards omnichannel retail strategy</li> <li>Rise in contactless delivery as well as attention to safety and hygiene ratings</li> </ul>	Managing business complexity in a hybrid online-offline model will be critical.
<b>Energy, utility and resources</b>	<ul style="list-style-type: none"> <li>Expected reliance on the spot and short-term market</li> <li>Sustained resilience of electric mobility</li> <li>Difficulty in servicing customer requirements due to supply chain volatility</li> </ul>	There is huge scope to automate operations, warehousing and supply chains by creating smart factories and using IoT and machine learning.

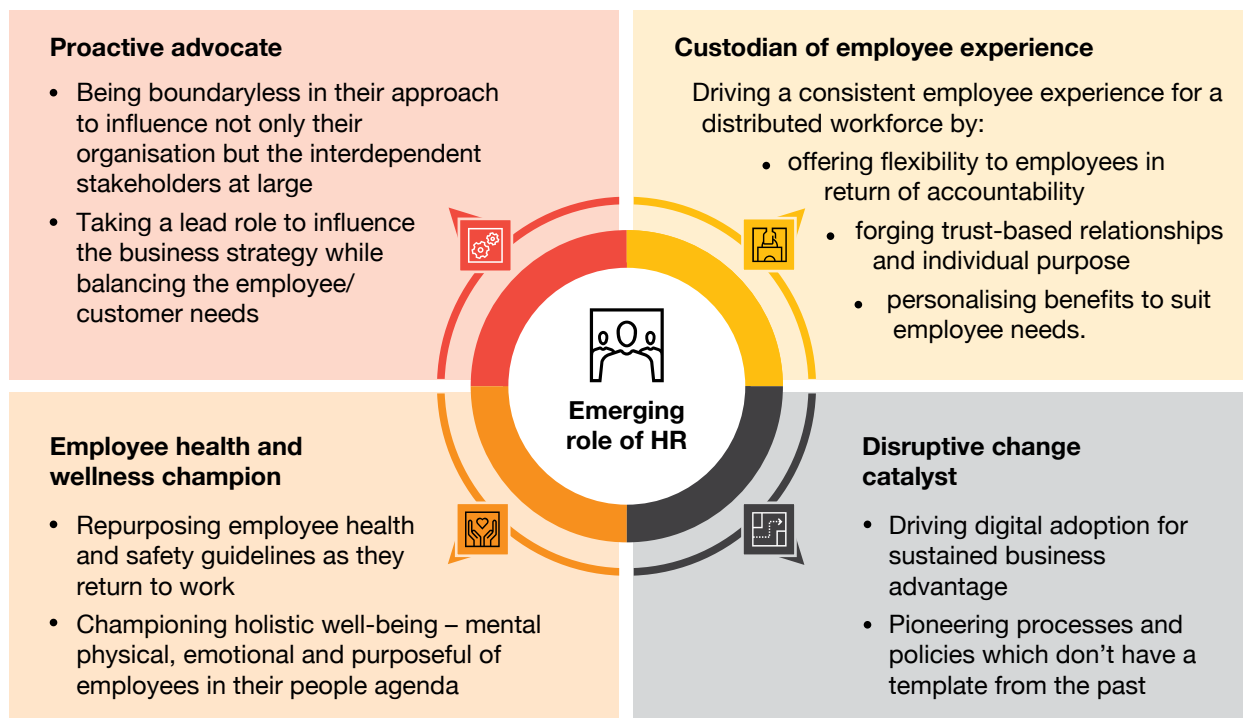
## 4.2 Role of HR in the new ecosystem

Given the emerging business shifts, we also checked for the overall readiness the leaders felt in managing the new normal. Our survey shows that on an average, 41% of the survey respondents consider their readiness level for the new normal to be low. This sentiment is stronger among leaders in the retail and consumer and infrastructure, manufacturing and automotive sectors. On the other hand, 30% of the survey respondents say they have now fully prepared to deploy the new workforce and business interventions and are starting to think about their long-term strategy.

### Overall level of readiness in managing the new normal



In the last six months, HR has played a pivotal role in helping organisations emerge stronger. The role of HR is also evolving to support organisations in maximising the value of technology investments, upskilling the workforce, taking into account their psychological and social outlook, and creating a common workplace for humans and bots. Increasingly, HR is being asked to play a more focused role as the custodian of employee experience, a disruptive change catalyst, employee health and wellness champion and proactive advocate to all stakeholders within the organisation and outside.



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It is time for HR to disrupt our ways of working, revolutionise the organisation's approaches, and align HR with the business and end customers.

- Dr. Aquil Busrai,  
Chief Executive Officer, Aquil Busrai Consulting

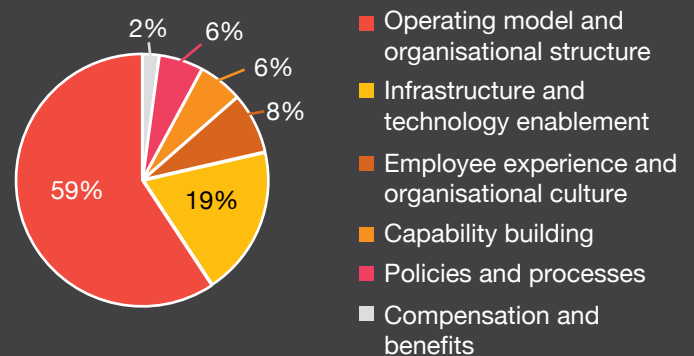


## Section 5:

# Excellence in organisational design

Managing uncertainty has always been part of the executive agenda and responsibilities but rarely have leaders come across a situation where they have had to deal with volatility in multiple areas all at once. In this section, we have tried to shed light on what this uncertainty means for the operating model and structure of organisations.

### Big shifts



## 59%

of the survey respondents expect the operating model and organisational structure to see the biggest shifts in the future.

## 5.1 Key changes in organisational design

During the lockdown, companies were forced to move to a complete/hybrid remote working model while focusing on survival and ensuring employee well-being and availability and continuity of operations and supply chains.<sup>5</sup> In our interviews and survey responses, a few of the shifts highlighted by industry stalwarts were as follows:

- **Realignment of organisational structure as per the to-be business delivery model:** Organisations are seeing a considerable change in their strategy and delivery model. They need to ensure that their structure is fit for the future.
- **Hybrid workforce deployment model:** In the long run, a lot of organisations will see a shift towards a hybrid workforce deployment model, with a mix of employees working from office and working from anywhere.
- **Change in employment models:** In the new normal, organisations will witness a shift from the traditional economy (full-time jobs) to the gig economy (side hustles and multiple jobs). Organisations will also look at different kinds of employment contracts.
- **Offshoring of select operations:** A few global organisations are likely to offshore select operations in order to de-risk a few business operations and optimise costs.
- **Localisation of select operations:** Countries are likely to promote local talent rather than hire from other countries.
- **Employee productivity management:** There is an increasing interest in how to manage employee productivity remotely.
- **Critical capabilities of the future:** Organisations are focusing on building internal talent and hiring for new roles relevant in today's context in order to survive and sustain in the highly competitive environment.<sup>6</sup>

59%

of the survey respondents expect to see the biggest shifts in the operating model and organisational structure.

25%

of the workforce will see a permanent shift and move to a work from anywhere model.

16%

of the existing work will be automated going forward.

9%

of the survey respondents say they are looking at hiring freelancers with relevant skills.

12%

of the survey respondents are looking at outsourcing some business functions.

33%

of the survey respondents feel that employee productivity has decreased.

52%

of the survey respondents feel that their degree of agility with respect to changing their operating model and organisational structure with ease and without disruption is low.

### Most of the survey respondents highlighted the following new roles:

- Data experts (data analysts, data visualisation experts, data scientists)
- Artificial intelligence, machine learning, cloud computing, blockchain and cyber security experts
- Jobs for people with higher emotional intelligence (customer care, consumer research, logistics, tracking, counselling, etc.)

5. PwC. (2020). Value conservation to value creation. Retrieved from <https://www.pwc.in/services/deals/value-conservation-to-value-creation.html#:~:text=Our%20Value%20conservation%20to%20value,June%20and%2010%20July%202020>.

6. PwC. (2019). Preparing everyone, everywhere, for the digital world. <https://www.pwc.com/gx/en/issues/upskilling/everyone-digital-world.html>

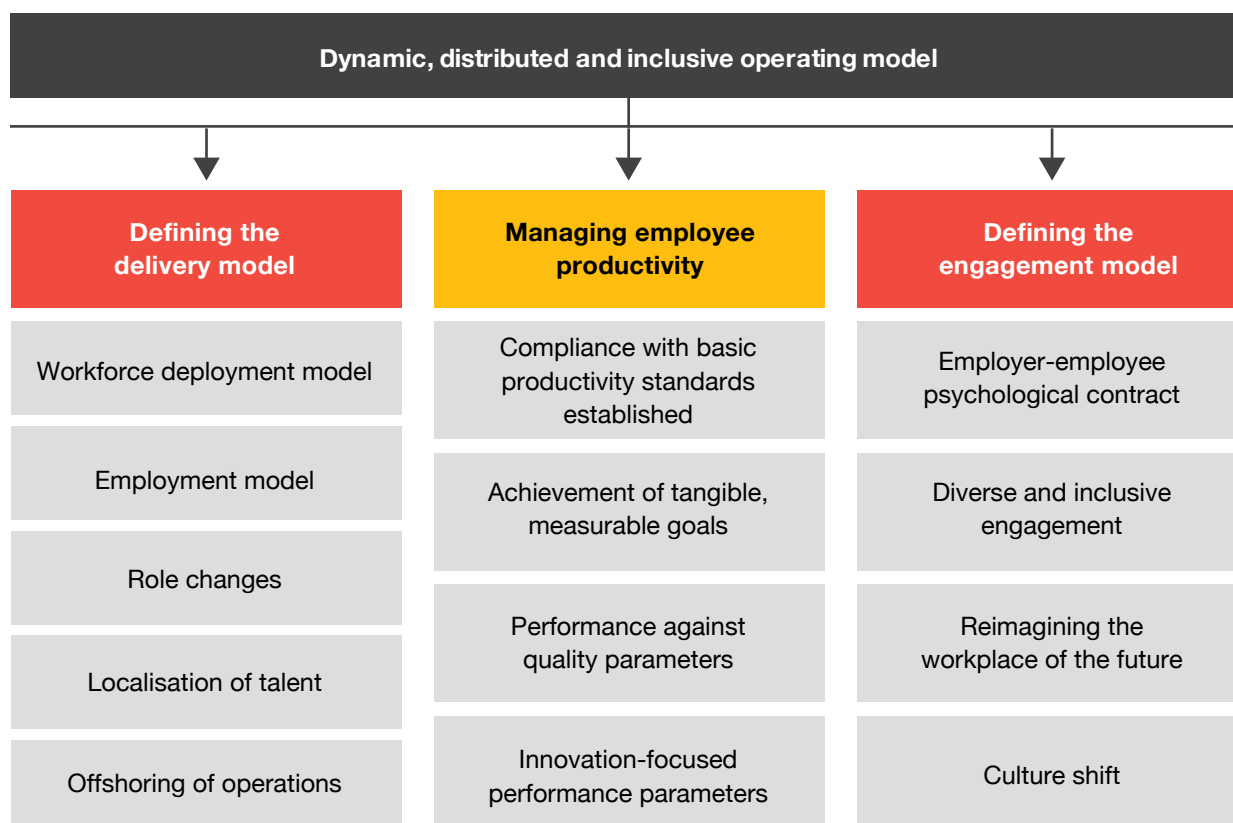
## 5.2 Our point of view: A dynamic, distributed and inclusive operating model

As priorities evolve, organisations are moving towards an operating model that is dynamic, distributed and inclusive, enables them to become future ready, and eliminates inertia and the high cost of change.

### Defining a dynamic, distributed and inclusive operating model

Dynamic operating model	Distributed operating model	Inclusive operating model
<ul style="list-style-type: none"> <li>• Agility to embrace change with ease and without disruption</li> <li>• Resilience to recover quickly in the changing business environment</li> <li>• Capability to deliver across the business value chain</li> </ul>	<ul style="list-style-type: none"> <li>• Right mix of employees working from office and working from anywhere</li> <li>• Right balance of permanent vs contractual staff</li> <li>• Workforce with an adequate mix of skills and capabilities</li> <li>• Offshoring of select operations</li> <li>• Right balance of local vs global talent</li> </ul>	<ul style="list-style-type: none"> <li>• Meets the requirements of all stakeholders who are part of the ecosystem</li> <li>• Manages employee preferences, employee experience, employee productivity, employee skilling and employer brand while delivering on business strategy</li> </ul>

In order to build a dynamic, distributed and inclusive operating model, organisations need to consider three dimensions: a) defining the delivery model, b) managing employee productivity and c) defining the engagement model.



### 5.2.1 Defining the delivery model

**78%** of the survey respondents feel that their ability to maintain a 'customer-first' approach and provide a positive customer experience as per changing needs is high.

The new normal has made organisations more open to new ways of delivering products and services to their customers with the existing workforce. In the next 18–24 months, organisations are likely to witness a shift in workforce deployment models, employment models, role changes, extent of offshoring operations, etc.

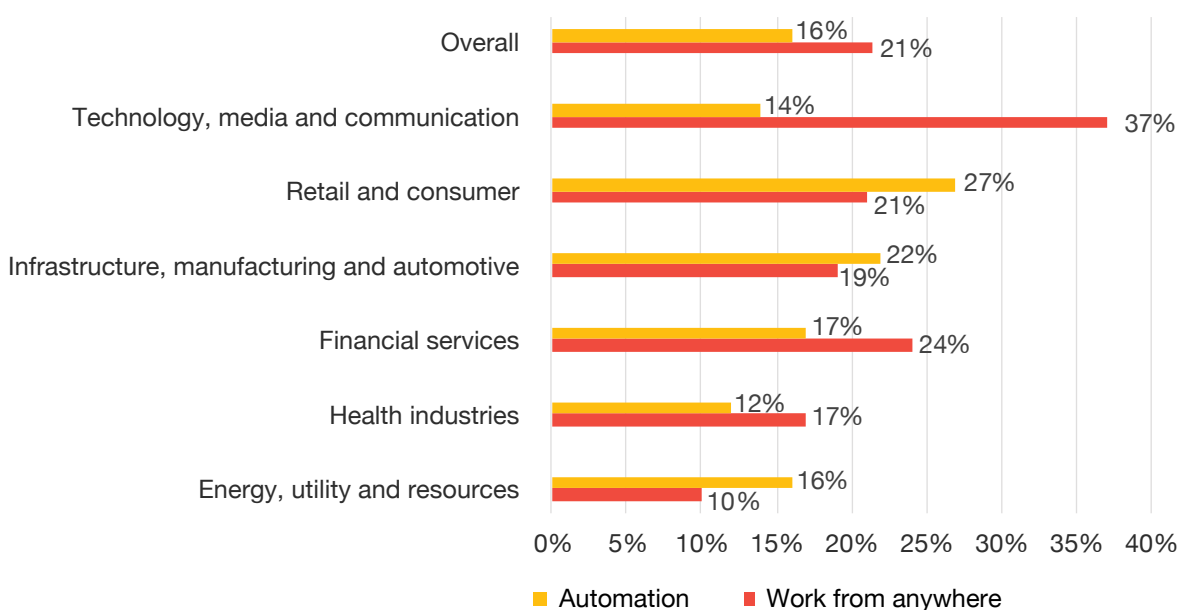
#### 5.2.1.1. Workforce deployment model

In our interviews with industry leaders, we observed widespread interest in moving towards some form of a hybrid workforce deployment model, with a mix of employees working from office and working from anywhere. On an average, across all industries, the survey respondents feel that 25% of the workforce will see a permanent shift and move to a work-from-anywhere model. The survey also indicates that 16% of the existing work will be automated going forward (see figure below).

**“** A lot of organisations are moving from brick-and-mortar models to online sales. One of the big industry shifts is managing channel partners remotely.

**- Binu Mathews,**  
Human Resources Director,  
HP Inc.

#### Workforce deployment model shifts



The perception that employees are less productive and effective away from the office and concerns related to business continuity have reduced. The leadership stance also appears to have softened, and there is growing acceptance of the work from home model. While a few organisations have already announced that they are planning to permanently shift to a hybrid workforce model and have initiated the same, many other industry leaders are thinking along the similar lines.

### Moving to a hybrid workforce model

Since the problem statement of every organisation is different, no one solution can apply to all of them. Leaders will have to figure out their own path, given the magnitude of potential changes. A few considerations (non-exhaustive) which will need to be evaluated to arrive at the right remote working continuum are shown below.<sup>7</sup> At the same time, it is important that a remote working strategy addresses the needs of all stakeholders.

“ The shifts pertaining to non-traditional workforce, contactless customer interactions, and a paradigm shift in terms of flexibility and work from anywhere are here to stay for the long-term. These are not driven by short-term cost-optimisation or productivity gains.

- Rachna Mukherjee,  
Chief Human Resources Officer,  
Schneider Electric

### Considerations and operationalisation aspects to arrive at the right remote working continuum

	Risk	Process	IT infrastructure	Collaboration and teaming dimension
Considerations	<ul style="list-style-type: none"> <li>Legal/regulatory constraints</li> <li>Data and information security</li> <li>Contractual constraint</li> <li>Location proximity (internal/customer)</li> <li>Disruption potential</li> </ul>	<ul style="list-style-type: none"> <li>Specialised processing equipment</li> <li>Hand-off frequency</li> <li>Paper based/manual steps/automation</li> </ul>	<ul style="list-style-type: none"> <li>Equipment provisioning (hardware, software)</li> <li>Access and connectivity needs (customer vs internal)</li> <li>Legacy systems or cloud based</li> </ul>	<ul style="list-style-type: none"> <li>Collaboration needs</li> <li>Team working (collective working)</li> </ul>
Operationalisation	<ul style="list-style-type: none"> <li>Data protection and ensuring adequate cyber security checks</li> </ul>	<ul style="list-style-type: none"> <li>Re-engineer business processes and HR processes (hire to retire journey)</li> </ul>	<ul style="list-style-type: none"> <li>Deploy infrastructure for remote working collaboration</li> <li>Build-in automation for more efficiency and effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>Role realignment</li> <li>Upskilling existing workforce</li> <li>Hiring new talent</li> <li>Redefining ways of working and work from anywhere guidelines</li> </ul>

7. [https://www.strategy-business.com/article/Creating-the-office-of-the-future?gko=04b17&j=69193&sfmc\\_sub=4937146&l=16\\_HTML&u=1135021&mid=510000034&jb=2](https://www.strategy-business.com/article/Creating-the-office-of-the-future?gko=04b17&j=69193&sfmc_sub=4937146&l=16_HTML&u=1135021&mid=510000034&jb=2)

### 5.2.1.2 Employment model: Moving to a liquid workforce

With the expected changes in the workforce deployment model, business needs and skill requirements, organisations are relooking at the current ratio of permanent versus contractual staff.

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**9%** of the survey respondents are looking at hiring contractual staff and freelancers with relevant skills.

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Gig economy jobs are expected to see an uptick. There will be a shift from the traditional economy (full-time jobs) to a gig economy (side hustles and multiple jobs to make the ends meet).

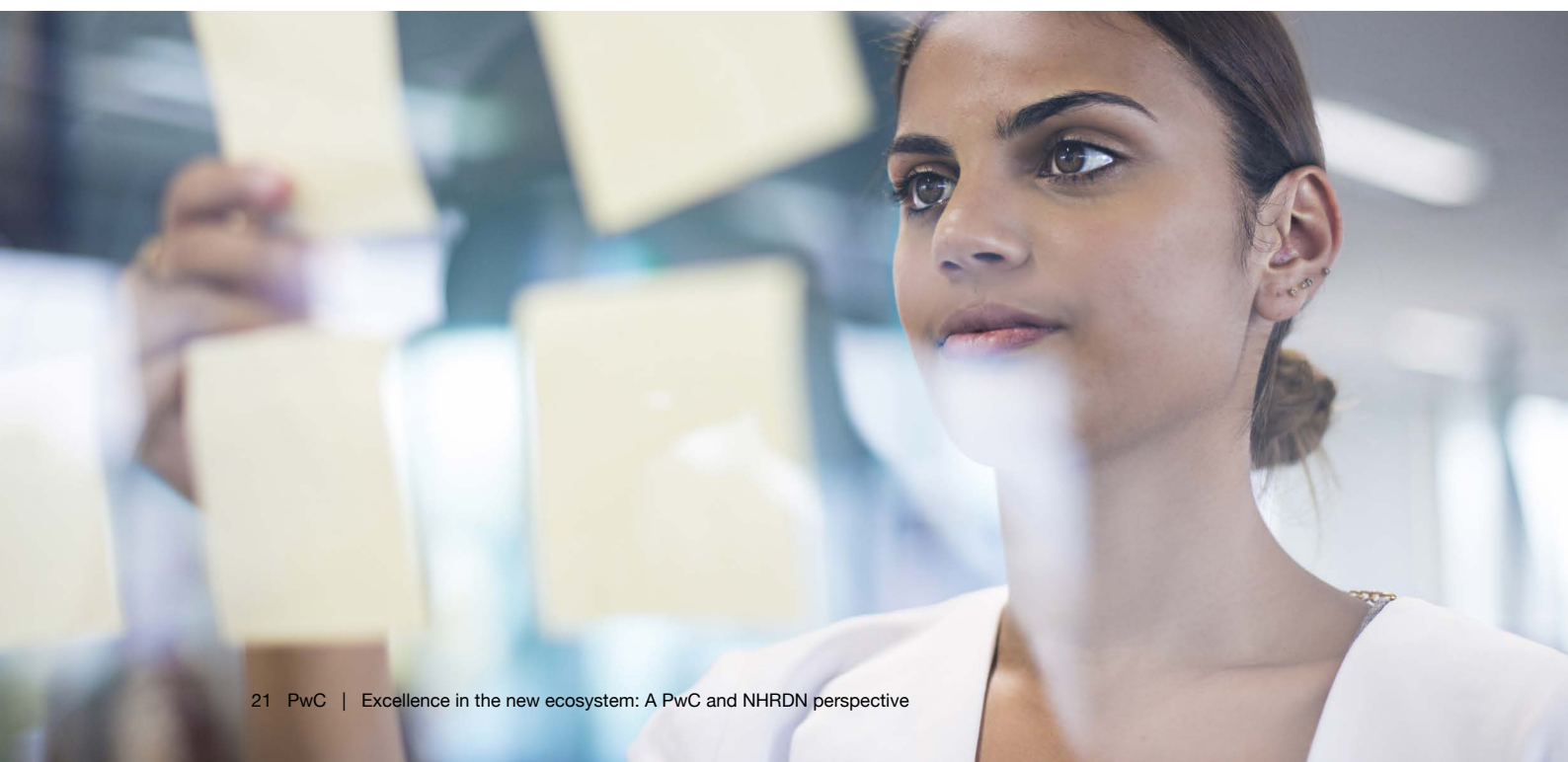
For many years, projections have been made on the rise of the gig economy. However, until now, the gig market has been dominant mainly in the semi-skilled space. COVID-19 might lead to a shift in the knowledge economy and various white-collar jobs to the gig mode.

The lockdown has had a negative impact on freelancers and self-employed, but they could stand to be the biggest gainers in the years to come. Once the economy revives and enterprises change their gears, the first set of new talent and skill needs may be fulfilled by freelancers. This can be attributed to the fact that companies are no longer averse to remote working models. The gig model is both commercially viable and gives employers the flexibility to manage their resource pool. It also leads to more task-level ownership and convenience. Organisations will need to decide on the right mix of traditional employment versus gig worker employment in order to ensure that their workforce is both dynamic and distributed.



Support internal assignments where workers work for six months and then move on by building more team communities and remodelling infrastructure to support team working as opposed to cubicles to make the hybrid workforce a success.

- Krish Shankar, Group Head – HR, Infosys



### 5.2.1.3 Role changes: Shifts in the job market

Organisations are focusing on innovation, automation and robotics to move away from traditional manufacturing practices. However, with the impact of the pandemic, the pace of automation will see an uptick. The demand for new and niche skills and corresponding talent to work in these new roles will also see a rise. Our survey respondents indicated that the following new roles will be created.

	Emerging roles*	
<b>Technology, media and communication</b>	<ul style="list-style-type: none"> <li>• Cyber security expert</li> <li>• AI/ML, automation expert</li> <li>• Change manager</li> <li>• Productivity enhancer</li> <li>• Process efficiency expert</li> <li>• Cloud engineer</li> </ul>	<ul style="list-style-type: none"> <li>• Cloud infrastructure manager</li> <li>• Digital media expert</li> <li>• Employee experience expert</li> <li>• Gig worker recruiter</li> <li>• Wellness manager</li> </ul>
<b>Financial services</b>	<ul style="list-style-type: none"> <li>• Chief data officer</li> <li>• Chief privacy officer</li> <li>• Customer experience manager</li> <li>• Virtual assistants</li> </ul>	<ul style="list-style-type: none"> <li>• Employee experience partner</li> <li>• Data analyst</li> <li>• Digital expert</li> </ul>
<b>Health industries</b>	<ul style="list-style-type: none"> <li>• Social media experts</li> <li>• Data analyst</li> <li>• Chief culture officer</li> <li>• Customer experience manager</li> </ul>	<ul style="list-style-type: none"> <li>• Safety expert</li> <li>• Experience specialists</li> <li>• Design and creative experts</li> </ul>
<b>Infrastructure, manufacturing and automotive</b>	<ul style="list-style-type: none"> <li>• Innovation catalyst</li> <li>• Data analyst</li> <li>• Digital expert – customer service, customer engagement</li> <li>• Quality expert</li> <li>• AI/ML, robotics, IoT expert</li> <li>• Electric vehicle engineer</li> </ul>	<ul style="list-style-type: none"> <li>• Health and safety expert</li> <li>• Virtual monitoring officer</li> <li>• Chief compliance officer</li> <li>• Chief culture officer</li> <li>• Talent management expert</li> <li>• Organisational design expert</li> </ul>
<b>Retail and consumer</b>	<ul style="list-style-type: none"> <li>• Data analyst</li> <li>• Digital champion</li> <li>• Digital marketing expert</li> <li>• Social media expert</li> <li>• Chief culture officer</li> <li>• Innovation expert</li> </ul>	
<b>Energy, utility and resources</b>	<ul style="list-style-type: none"> <li>• Business excellence</li> <li>• Data analytics</li> <li>• Robotic assistants and kiosks</li> </ul>	

\*Based on survey responses

“ There is a clear premium, not in terms of role, but in terms of the type of people who are becoming more relevant for the organisation – people who are able to influence and communicate well.

- Piyush Mehta, Chief Human Resource Officer, Genpact

#### 5.2.1.4 Localisation of talent

During our interviews with industry executives, an expected trend highlighted by a few of them was that countries are likely to promote local talent rather than hiring from abroad. Working overseas/studying abroad and seeking jobs there might see a substantial slowdown. Also, there will be more employment from Tier 2/Tier 3 towns. Lots of employees in metro/Tier 1 cities have migrated to their hometowns during the lockdown. The focus for HR heads has now shifted to having a distributed workforce by spreading their manpower to more geographies. This will help organisations de-risk business operations.

#### 5.2.1.5 Offshoring of select operations

Organisations are looking at offshoring select operations to make the operating model more distributed and dynamic.

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**12%** of the survey respondents are looking at outsourcing some business functions.

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The bigwigs in the Indian offshoring industry may need to revisit their operations. The industry that has made India a go-to destination for high quality and low-cost technology skills and faster turnaround of work would need to revisit its approach and start a second wave of upskilling the Indian workforce to cater to the global skill requirement. The role of government and industry bodies will be critical in training the workforce on relevant skills. Offshoring and IT industries will also have to think of ways to market the available skills in the right way to support business delivery and, at the same time, optimise costs for global organisations.















### 5.2.2 Managing employee productivity in a remote working model

Driving a high-performance culture through an engaged and productive workforce has always been a herculean task for organisations. In these unprecedented times and with remote management of employee productivity, the challenges have increased multifold and many organisations are trying to find solutions.

**67%** of the survey respondents feel that employee productivity has increased/stayed the same, and  
**33%** feel that employee productivity has reduced during the pandemic.

Organisations will have to make a concerted effort to sustain productivity while moving from the physical world of work to remote working. Remote working has its own advantages. However, it also poses a risk of misalignment, lack of collaboration, lack of trust and employee engagement – all of which are likely to impact employee productivity. At PwC, we believe that managing productivity is a combination of having the right metrics to track performance and provisioning for interventions that enable productivity.

Measurement	Enablement
<div> Compliance with basic productivity standards established</div> <div> Achievement of tangible, measurable goals</div> <div> Performance against quality parameters</div> <div> Innovation-focused performance parameters</div>	<div><div><div> Leadership behaviours</div><div> Self-initiated measures</div><div> Technology and infrastructure</div><div> Organisational ways of working and culture</div></div><div><div> Talent engagement initiatives</div><div> Linkage to performance management, rewards and recognition</div><div> Physical and mental well-being</div><div> Communication – role, accountability, goals, etc.</div></div></div>



## Embedding the right checks and balances to measure productivity

We believe that productivity should be defined and measured at four levels (refer to the figure below). Organisations will have to redefine what they measure at these four levels. A few initiatives<sup>8</sup> that can be taken to enhance productivity at these four levels are:

Compliance with basic productivity standards (SLA based, time based)	Achievement of tangible, measurable goals	Performance against quality standards	Innovation-focused performance parameters
<ul style="list-style-type: none"> <li>Re-engineering business processes to define workflows by activity and not time</li> <li>Deploying workflow management tools</li> <li>Reducing effort leakage with strict monitoring and lead management systems; boosting productivity by using data analytics</li> </ul>	<ul style="list-style-type: none"> <li>Ensuring alignment of performance metrics with current organisation strategy and goals</li> <li>Using performance monitoring tools to support clearly defined key result areas (KRAs) and key performance indicators (KPIs) for responsibilities and accountability</li> </ul>	<ul style="list-style-type: none"> <li>Ensuring quality standards/metrics are part of employee performance scorecards</li> <li>Reviewing the scope for outsourcing non-essential services to vendors; ring-fencing quality with strict SLAs</li> </ul>	<ul style="list-style-type: none"> <li>Ensuring innovation-based measurable goals are part of employee performance scorecards</li> <li>Building in positive recognition for innovation</li> </ul>

## Enabling employees to work effectively and be more productive

Organisations will have to innovate and come up with different interventions to drive the measurement of success/performance measures. A few initiatives/interventions that could help organisations enable employee productivity:<sup>9</sup>

- demonstrating leadership behaviours that enable productivity** (act as a virtual role model for the team, effectively allocate and monitor tasks remotely, build team connect, offer support, design collaboration and work experiences)
- ensuring empowerment and decentralisation of responsibilities, accountabilities as well as governance
- re-engineering processes for distributed control**
- deploying the right collaboration tools** that allow employees to work efficiently and, at the same time, allow effective oversight of work/tasks
- deploying **digital tools** for enabling sales and services
- revisiting existing organisational ways of working and culture**
- building in **positive recognition**
- designing training modules for **upskilling of employees**
- focusing on **employee well-being**.

“ The time has come when organisations should move to a nonlinear approach to improve productivity by supporting employees on the personal front (e.g. being mindful of children’s online classes, providing support for emotional well-being).

- **Magesh Sambasivan**,  
Head – Human Resources,  
Société Générale Global  
Solution Centre

8. PwC. (2020). Reimagining Indian retail banking: The impact of COVID-19 and way forward. Retrieved from <https://www.pwc.in/assets/pdfs/services/crisis-management/covid-19/reimagining-indian-retail-banking-the-impact-of-covid-19-and-way-forward.pdf>

9. PwC. (2018). Workforce of the future: The competing forces shaping 2030. Retrieved from <https://www.pwc.com/gx/en/services/people-organisation/workforce-of-the-future/workforce-of-the-future-the-competing-forces-shaping-2030-pwc.pdf>

### 5.2.3 Defining the employee engagement model

The current situation has pushed into focus the need for organisations to put the lives of employees before livelihoods. As a result, the psychological contract between the employer and employee is changing markedly. The concept of flexibility is evolving and is no longer restricted to flexible working hours; rather, it is also becoming an important consideration in terms of jobs, roles and teams. The engagement model, therefore, is also changing based on how these issues are addressed by HR leaders. We will explore these aspects in more detail in the section 7.

## Excellence in organisational design – key insights

- Operating model and organisation structure are set to witness the biggest shifts in the new ecosystem for business continuity.
- Intensified disruption and changing consumer needs are necessitating the change to a hybrid operating model and a distributed workforce
- Building a dynamic, distributed and inclusive operating model will require leaders to understand both the employee's asks and organisational goals.
- The decision should be made based on an analysis of multiple factors such as employee productivity, workforce accessibility, employee experience and infrastructure cost. Ultimately, leaders are left with a complex problem to solve – one involving multiple factors and that defies simple formulas.





## Section 6:

# Excellence in organisational capability

The shift in operating models has provided organisations with the opportunity to reimagine new ways of working for increased productivity, innovation, growth and enhanced employee experience. Thus, with the onset of a dynamic, distributed operating model, the approach towards building future capability and managing talent is changing significantly as well. In this section, we aim to acknowledge the big shifts that are underpinning the future capability development strategy for organisations and a sustainable approach to derive value from the investments in developing organisational and leadership capabilities.

## Big shifts underpinning future capability development strategy – leader perspectives

Accelerated adoption of digital technologies widening the skills divide	Emergence of organisational and leadership capability continuum	Emerging talent risks in the new normal
<ul style="list-style-type: none"> <li>Knowledge of using virtual platforms for communication/collaboration is becoming common across organisations.</li> <li>Digital technologies are being adopted by organisations for contactless operations and customer engagement.</li> <li>Organisations are using mobile-first platforms for business continuity and hybrid operations.</li> <li>Organisations are digitally upskilling the workforce and engaging in rapid adoption of technology.</li> </ul>	<ul style="list-style-type: none"> <li>Leadership capabilities are not only inter-related to organisational capabilities but are also interdependent yet unique in their contribution towards future-readiness of the organisation.</li> <li>The emergence of intersection of building individual capabilities and organisational capabilities require simultaneity in their journeys as a critical success factor.</li> </ul>	<ul style="list-style-type: none"> <li>Apart from assessing critical roles that will help businesses, companies are reflecting on employees who are a top retention priority</li> <li>Companies are redefining policies to balance employee costs and business continuity.</li> <li>Companies are rewarding employees based on specialised skills, democratisation of leadership and learning.</li> <li>Managers are not equipped to deal with a demand plus supply problem as there is no template from the past</li> </ul>
Emotional quotient taking a front seat	Leadership styles undergoing significant changes	Focus on building a sustainable future
<ul style="list-style-type: none"> <li>Capabilities of mind and heart are taking precedence with an increase in automation.</li> <li>Extreme care for stakeholders, clarity of core value and purpose are need of the hour.</li> <li>'Circle of trust' is now the single-most ask of leaders in the new normal.</li> <li>Emergence of empathy, compassion, and emotional intelligence are the key differentiators for leaders.</li> </ul>	<ul style="list-style-type: none"> <li>Leaders and managers need to be able to build disruptive models and make sense of disconnected events.</li> <li>Leaders are learning to adapt and respond with speed to navigate ambiguity in leading a distributed workforce.</li> <li>Out of the box thinking, systems mindset and collaboration/leveraging synergies will be keys to navigate business challenges.</li> </ul>	<ul style="list-style-type: none"> <li>Increase orientation towards building and sustaining the organisation with agility and resilience.</li> <li>Organisations will focus on 20% more growth and function with 25% less workforce for enhanced agility and increased productivity</li> <li>Develop a frugal mindset with a clear balance of spends and delivering customer/employee experience.</li> </ul>

## 6.1 The conundrum of build vs buy vs borrow

In addition to these big shifts, the pandemic has accelerated the capability gap in the existing workforce, thereby making it harder to attract and retain talent with requisite skills. This has always been a key concern for CEOs and CHROs, but has now amplified multi-fold in a very short period of time.

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**74%** of the CEOs surveyed in PwC's 23rd Annual Global CEO Survey are concerned about the availability of key skills.<sup>10</sup>

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The new normal has compelled organisations to redefine roles and the capabilities required to execute such roles effectively. While rapid automation has resulted in certain types of jobs being at the risk of becoming obsolete and resulting in large-scale layoffs, new roles are emerging in the industry landscape, requiring very different sets of skills and mindsets. Our interview and survey data on the critical capabilities required in the new ecosystem can be categorised into digital, functional and leadership skills and mindsets.

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### Critical capabilities required in the new ecosystem

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Digital skills and mindsets	Functional skills and mindsets	Leadership skills and mindsets
<ul style="list-style-type: none"><li>• Data analytics and visualisation</li><li>• Applications of artificial intelligence (AI) and machine learning (ML)</li><li>• Data science</li><li>• People and performance analytics</li><li>• Digital platforms for collaboration</li><li>• Digitisation of processes</li><li>• Data-driven decision making</li></ul>	<ul style="list-style-type: none"><li>• Safety and quality mindset</li><li>• Virtual selling process</li><li>• Remote CRM</li><li>• Online accounts and banking</li><li>• Design thinking</li><li>• Online training/education</li></ul>	<ul style="list-style-type: none"><li>• Adaptability to change</li><li>• Resilience</li><li>• Endurance/persistence</li><li>• Learning intelligence</li><li>• Learning agility</li><li>• Collaboration and teamwork</li><li>• Empathy</li><li>• Flexibility mindset</li><li>• Emotional intelligence</li><li>• Stress management</li></ul>

With the accelerated requirement for the infusion of these capabilities in the organisation and increased value consciousness, leaders are compelled to balance the strategy for bridging the capability gaps with a combination of build, buy and borrow. In our survey, 60% of the respondents' favour building capabilities for their existing workforce instead of sourcing them externally, and 27% would rather borrow than buy capabilities from the market

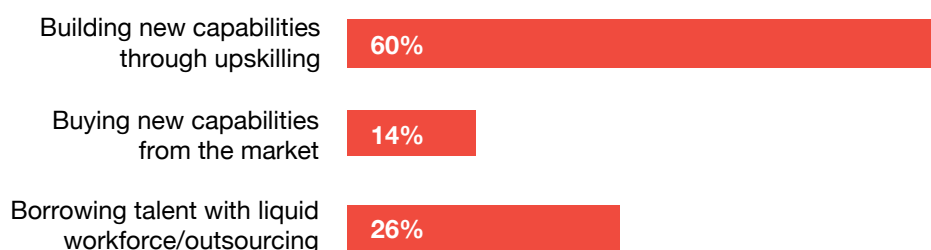
10. <https://www.pwc.com/gx/en/ceo-survey/2020/reports/pwc-23rd-global-ceo-survey.pdf>

One of the key drivers for this choice of strategy could be the non-availability of requisite skills, mindsets and behaviours in the talent ecosystem that are required in the new normal for the emerging jobs/roles. This has expedited the need for organisations across industries to create sustainable upskilling strategies to address the discrepancy between the skills people have and those needed for jobs/roles in the new normal.

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### Strategy to address the changing capability requirements

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Source: PwC analysis of survey data

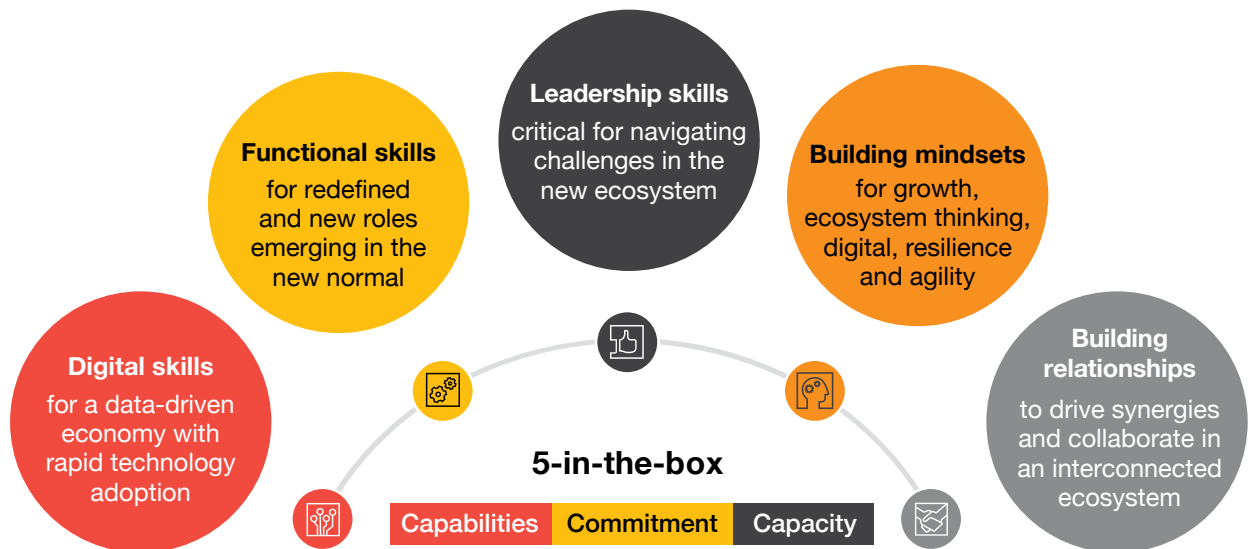
## 6.2. Sustainable strategy for upskilling

Developing a workforce with the requisite digital, functional, leadership and transferable skills organisations need and the ability to adapt quickly in a world of constant change does not happen organically or by accident. A well-designed upskilling strategy to develop a workforce with the requisite skills, mindsets, relationships, behaviours, resilience and agility is important.

Upskilling is no longer seen as an attempt to catch up with automation, but a necessary action to make businesses more agile, resilient and people centric while employees are prepared to get accustomed to the requirements of the digital world. Leaders today realise the importance of upskilling individuals and organisations, and transform the workforce to drive productivity, innovation and growth by anticipating the right skills for the future. They are laying the cultural foundation, delivering modern upskilling programmes and building a learning and development function with the right technology to deliver a vastly better return on upskilling investment. We recommend a 5-in-the-box framework for building organisational and individual capabilities with equal focus on building capacity and driving commitment for change. The framework considers the need to build skills – digital, functional and leadership – and mindsets and relationships that are critical to bring about the changes necessary for an organisation's success.



## PwC's 5-in-the-box framework for building organisation and individual capabilities



## Organisational capacity building through system and process enablers

Digital infrastructure	Digital ecosystem	Governance	Benefit realisation
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The critical success factors for adoption of capabilities are:

1. building a learning ecosystem that enables self-learning
2. providing access to digital content and opportunities for formal and social learning
3. establishing systems and processes to enable the learning ecosystem through gamification of learning, incentivisation
4. enabling digital governance and IT infrastructure support.



To bring this framework to life, the following considerations enable organisations to design a holistic approach towards upskilling:



Upskilling considerations	Key reflections from leaders/best practices
1. Organisational context	<ul style="list-style-type: none"> <li>Upskilling strategy aligned to business objectives and context</li> <li>Learning about operating models and strategy to be defined basis the priorities and upskilling objectives</li> </ul>
2. Role expectations	<ul style="list-style-type: none"> <li>Key priorities and strategic choices defined for multiskilling/cross-skilling/specialised talent, including agile adjacencies</li> <li>Skill-based approach to upskilling by defining roles as a cluster of skills</li> </ul>
3. Differentiated approach	<ul style="list-style-type: none"> <li>Departure from a one-size-fits-all approach towards upskilling</li> <li>Access to personalised, tailored and relevant online digital content</li> </ul>
4. Implementation and measurement	<ul style="list-style-type: none"> <li>Learning analytics made easy with virtual learning to measure effectiveness and return on investment (RoI) as key metrics for the success of upskilling</li> <li>Upskilling as a driver for employee experience with focus on adoption.</li> <li>'Citizen-led innovation' approach to measure the adoption of learning</li> </ul>

Ultimately, the true value of any upskilling initiative is realised when there is user-led adoption and innovation through active experimentation, and application of learning on the job.



Learning can be effectively used as an engagement or assimilation challenge.

- Avantika Susan Nigam,  
Director and Head – HR, PepsiCo GBS

### 6.3. The paradigm shift in leadership in the new ecosystem

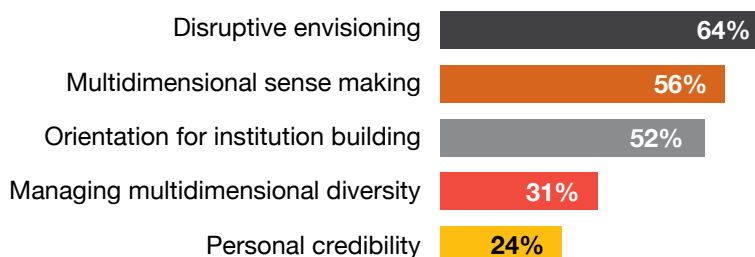
Given the quantum of big shifts and rapid changes, leaders worldwide are making agile decisions across the functions of an organisation – some for the near term as one-time adjustments for dynamic situations and some as long-term measures to permanently change the ways of working. Leaders have never had to navigate so many dilemmas and reconcile with so many contradictions simultaneously. For leaders, the new normal has truly been a leadership crucible testing their true capabilities, principles, belief systems and core values, enabling them to emerge stronger and more authentic, and forging their reputations.

PwC's 2017 report on 'Reimagining leadership: Steering India's workforce in 2030' outlined nine critical leadership capabilities for the future.<sup>11</sup>

#### Critical leadership capabilities for the future

<b>Disruptive envisioning</b>	Mental courage and perspective to cut through the noise of today to <b>challenge paradigms and plan for multiple futures</b> for the organisations of tomorrow
<b>Multidimensional sense making</b>	The ability to <b>make sense of the context in a complex environment</b> (VUCA world) and constantly challenge old mental models and assumptions
<b>Orientation for institution building</b>	The ability to <b>place an organisation's mission and purpose above everything</b> , including personal wins and achievements
<b>Managing multidimensional diversity</b>	The ability to <b>lead a workforce comprising multiple generations, cultures, employment models</b> (part time with multiple employment contracts, full time) and compositions (machines, bots, AI and humans)
<b>Personal credibility</b>	Consistently <b>displaying authenticity of thoughts and actions</b> , leading to the creation of a strong personal brand of excellence and dependability
<b>Talent magnetism</b>	The ability to <b>lead without authority, inspire trust and rally people</b> towards a common purpose/vision
<b>Self-awareness</b>	The ability to be <b>honest about oneself</b> and the impact being created on the ecosystem/environment
<b>Building and nurturing networks</b>	The ability to <b>work with a range of traditional and non-traditional partners/ stakeholders</b> in a constantly evolving network
<b>Curious to learn and evolve</b>	The ability to <b>learn continuously and evolve</b> in order to stay relevant

While all nine leadership capabilities are still relevant, our survey findings reveal that **orientation for institution building** and **personal credibility** have become more prominent in dealing with the challenges of the new ecosystem.



Source: PwC analysis of survey data

11. <https://www.pwc.in/assets/pdfs/consulting/people-and-organisation/reimagining-leadership/steering-indias-workforce-in-2030.pdf>

Today, leaders are having to increasingly play the role of dot connectors within the organisation and the ecosystem at large to leverage synergies across the business value chain. Though the task may seem daunting, it can be enabled by moving towards a distributed leadership model and providing the space for leaders to bring their whole self to work.

#### 6.3.1. Distributed leadership

Organisations are realising the importance of shared accountability and empowerment in dealing with challenging situations in the new ecosystem. There is clear value in collective resilience with a collaborative approach instead of a siloed approach to solve leadership crises. For instance, in a leading car manufacturing company in India, the distributed leadership concept came to life to deal with a crisis. Instead of a few people leading from the front, multiple second/third line of leaders came forward to avoid burnout in functions that are stretched the most, given that the stress in supply chain and production is not limited to the organisation but also affects the dealer ecosystem.

#### 6.3.2. Whole leadership

Traditionally, leaders have always guarded their vulnerabilities with bounded optimism and deliberate calm. However, considering the seriousness of the current crisis, hiding vulnerabilities could be exhausting and isolating. Therefore, it is important for leaders to embrace moments of vulnerability by acknowledging their current state, taking responsibility for their emotions and asking for help. Leaders don't have to have the solutions to all problems, and should be comfortable to engage with people for alternative perspectives and thoughts.

The new normal has diminished the boundaries between work and personal spaces. It is important to maintain work-life balance through increased transparency, accountability and vulnerability. The importance of human-centric skills comes to the fore with empathy, flexibility, agility, intuition and the ability to leverage the constructive emotional energy for building resilient leadership.

“ We have focussed on building our ecosystem as a part of the new normal by promoting distributed leadership to decode, learn and share the experience of handling the COVID-19 crisis.

- S.Y. Siddiqui,  
Chief Mentor,  
Maruti Suzuki India Ltd.

“ Leaders need to exhibit more connections at the personal front while managing teams. They need to develop a higher emotional quotient to manage individuals, teams and working relationships.

- Magesh Sambasivan,  
Head HR,  
Société Générale Global  
Solution Centre

Mindfulness and coaching are important to bring balance to chaotic, personally and professionally demanding situations in the new normal. Thus, by accommodating the whole self for themselves and their teams, leaders can be truly authentic and build trust, transparency and an empowered workplace for their employees.

## 6.4. Strengthening the ecosystem

While organisations are struggling to find the right talent to bridge their growing capability gaps, there are millions of unemployed, overqualified or under-skilled workforce with no relevant skill sets to fulfil specific emerging roles, leading to an incredible loss in growth and economic prosperity. Very few countries have designed and implemented a truly holistic national skills strategy that aligns with the new needs emerging out of the massive corporate investment in technology. Educational systems aren't fast enough to adapt to the constant changes of market demands and digital developments.

The key to ensure that adequate talent is available for the job market of the future is to create an upskilling ecosystem. Such an ecosystem will be beneficial for upskilling and building talent readiness, comprising the Government, businesses, technology providers, industry bodies and individual employees working together to design sustainable job opportunities and to secure continuity and competitiveness in organisations.

Luxembourg's Skills Bridge initiative by PwC and other programmes on upskilling benefit from active government involvement. Based on our experience, we realise that companies are keener on embracing upskilling when the local government supports the initiative.

In an endeavour to prepare a generation of skilled employees and leaders in alignment with the modern-day market demands, Prime Minister Narendra Modi launched the Skill India initiative in 2015. The initiative was launched to train over 40 crore citizens with different industry-relevant skills by 2022 and is implemented through a streamlined institutional mechanism.



## 6.5. The role of organisational capability development goes beyond bridging skill gaps

While one of the key triggers for the capability development agenda is to address the growing skill-gap divide in the new ecosystem, building organisation and leadership capability at large also enables organisations to build confidence with clear, practical course of action in an increasingly uncertain world. Further, it fosters a continuous learning ecosystem for increased organisation agility and dynamism to face future disruptions or volatility in the business landscape, and also builds a positive employee experience enhancing retention as well as discretionary effort and engagement with the organisation. This in turn builds employer brand in an increasingly competitive market for talent and enhances an organisation's reputation in a world where trust is an increasingly valuable commodity.

### Excellence in organisational capability – key insights

- Upskilling is the preferred strategy of leaders to bridge the increasing capability gaps due to increased automation and emergence of new roles in the new ecosystem.
- A holistic design and systematic approach to upskilling is key for organisations to build capabilities that are sustainable by placing equal focus on organisational capacity building and driving adoption.
- Interconnectedness with the ecosystem and developing an institution building mindset is the key ask for the new breed of leaders in the new ecosystem.
- Increasing importance of leaders' personal credibility has pushed organisations to consider distributed leadership model and create space for leaders to embrace their whole authentic self.
- The key to ensure talent availability and talent-readiness in the job market of the future is to create an upskilling ecosystem with concerted efforts from Government, businesses, technology providers, industry bodies and individual employees.



A photograph of a modern skyscraper with a glass facade, featuring cantilevered balconies and a grid-like structure. The building is partially obscured by a yellow rectangular overlay on the left side of the page.

Section 7:

# Excellence in organisational culture

Given the aforementioned emerging shifts in organisational design and capabilities, it has become clear that human capital is as (if not more) important as technological and financial capital. Organisations are witnessing an unprecedented strain on their ability to keep their employees engaged during this time of crisis as they become increasingly anxious about an uncertain future.

The overarching theme that surfaced across sectors during the survey was the need to reinvent organisational culture in light of the new ways of working.

## Key shifts and trends of organisational culture – leader perspectives

Redefining flexibility in light of the hybrid working model	Putting well-being at the centre of employee experience	Having an outcome-based performance management system in place
Building an inclusive and tolerant culture across the distributed workforce	Ensuring greater diversity in terms of increased female participation in the workforce	Reimagining an organisation's purpose and values to reinvigorate the employees' trust in the organisation
Evolving psychological contracts between the employee and the employer	Putting the customer's needs first and addressing their pain points	Integrating culture and human capital to create future-ready organisations

Engagement is the only measurement CEOs and HR leaders trust when it comes to people in organisations. We believe that employee engagement is a combination of the employee's experience (how the employee feels while working in an organisation) and an organisation's culture (what the employee believes that the organisation stands for, its values and purpose).



Let us understand each of these pillars in further detail.



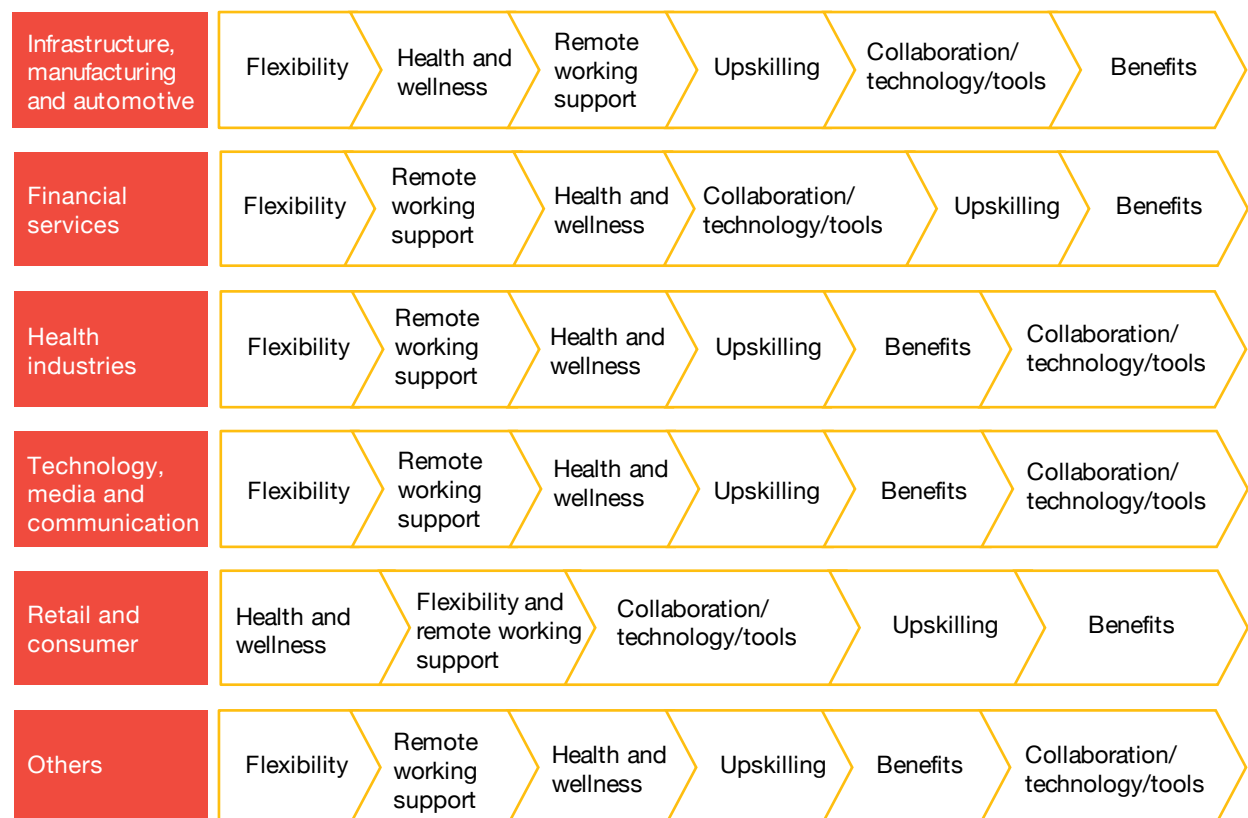
## 7.1 Reimagining employee experience

Employee experience is the sum of every interaction employees have with their organisation throughout their tenure, and perhaps even after moving on from the organisation. If employee engagement is a measure of how employees respond, employee experience is how they feel.

Employee experience can be viewed as an investment that organisations make to reap the highest returns possible in the long run, the results of which not only reflect through increased employee engagement but also help establish solid foundations for business continuity in a post-crisis era. Employee experience creates a cohesive and meaningful culture that becomes beneficial for not only employees but also partners, competitors and the ecosystem in general.

The following levers emerged as the top employee expectations to drive a meaningful and humanised employee experience.

### Sectoral ranking of emerging employee expectations



Source: Survey responses

To reimagine employee experience, here are some of the best practices that organisations have implemented during the crisis:

<b>Flexibility</b>	<ul style="list-style-type: none"> <li>• A professional services firm is giving its employees who commute long distances the option to work remotely on a permanent basis.</li> <li>• The return-to-work initiative is being designed for employees with respect to the nature of work, client requirements and functional delivery.</li> </ul>
<b>Health and wellness</b>	<p>A multinational conglomerate is repurposing its employee health and safety proposition to:</p> <ul style="list-style-type: none"> <li>• Ensure plant safety for enabling its workers to return to work. It is following a policy of preventive identification by assessing which offices are fit for work, planning employees' return to the workplace and ensuring proper compliance at plant locations.</li> <li>• Draft clear protocols to go to the field for a customer location on the basis of appropriate approvals obtained by the employees.</li> <li>• Develop an in-house infection risk assessment application for individuals working in factories.</li> <li>• Arrange for Sunday virtual connects with workers and their families to create awareness on health and safety.</li> </ul>
<b>Remote working support</b>	<ul style="list-style-type: none"> <li>• An Indian multinational corporation has initiated soft loan offerings to its employees for purchasing and setting up personal infrastructure that will aid in remote working.</li> </ul>
<b>Upskilling</b>	<ul style="list-style-type: none"> <li>• A multinational professional services firm has created a scalable virtual learning platform for its employees which houses completely contextualised content relevant to the organisation. The platform enables the organisation to learn collectively as opposed to individual module-based learning.</li> <li>• Organisations are moving towards building virtual academies that house all their custom as well as generic content and using such academies to map career movements. Thus, upskilling is becoming central to their talent management.</li> </ul>
<b>Benefits</b>	<ul style="list-style-type: none"> <li>• A consumer goods organisation has revamped its flexible baskets for the employees and provided laptops for the children of the frontline staff to so that the children are able to attend online classes.</li> </ul>
<b>Collaboration/technology/tools</b>	<ul style="list-style-type: none"> <li>• An Indian bearing manufacturer and exporter has leveraged augmented reality (AR)/virtual reality (VR) to create interactive training modules where shop floor workers can learn about operating plant machinery virtually.</li> </ul>

### 7.1.1. Our point of view: A human-centred employee experience



Source: PwC UK

Employee experience touches many aspects of our day-to-day lives – from compensation to relationships and accessibility. It helps employees find meaning at work. Hence, we need to take a more holistic and human-centred approach when designing employee experience. In order to generate higher RoI from workforce investments and drive business impact, organisations must design employee experience across culture, technology, operating models and workplaces.

- 1. Cultural experience** – mindset and behaviour shift, diversity and inclusion, organisation purpose and reputation
- 2. Organisational experience** – organisational design, HR transformation, HR process optimization and workforce planning
- 3. Technology experience** – AI and automation, technology tools for collaboration and efficiency
- 4. Workplace experience** – global mobility, financial modelling of workplace asset and adjustment costs, and remote working strategy

Using a designed thinking and agile transformation approach, a few considerations that must be kept in mind while designing and implementing employee experience are given below.

<b>Focus on what will make the most impact</b>	<b>Identify RoI triggers</b> by prioritising what matters most to the business and different segments of the workforce.
<b>Use data to benchmark and make better decisions</b>	<b>Use data</b> gathered on the business and persona groups to learn about the needs and expectations of the workforce. This can be benchmarked against other organisations.
<b>Leverage AI-driven tools to drive change</b>	<b>Make interactions quicker, simpler and intelligent</b> by using our intuitive digital worker to automate the mundane, predict needs, and drive action.
<b>Establish new deal with employees and customers</b>	<b>Create more ownership and buy-in</b> by involving the workforce in co-creating solutions, helping to drive innovation, engagement, productivity, and better customer service.
<b>Establish demand and need before investment</b>	<b>Save money</b> by testing any future technology or transformation investments against internal and external demand and business factors like new career paths or automation.

## 7.2 Reinventing organisational culture

An organisation's culture is at the heart of its ability to bring alive employee experience. Jon Katzenbach, author and leading practitioner in organisational strategies for Strategy&, defines culture as the self-sustaining patterns of behaviours and mindsets that determine how work gets done. An organisation's culture is often the strongest guiding principle during crises. How quickly an organisation adopts change, is resilient during crises and manages to align with the evolved ecosystem may depend heavily on the collective behaviour of the organisation when facing massive shifts.

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**62%** of the survey respondents say that going forward, their organisation will become more people oriented and inclusive, and less authoritative in their actions.

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Culture in workplaces is not built overnight. But once strong foundations are laid, it enables organisations to survive challenging times. The current crisis has pushed organisations and their leaders to prioritise physical, mental, emotional and purposeful well-being, while continuing with business operations.

Leadership bandwidths as well as their communication and action are under constant scrutiny. Organisations will be closely watched for the decisions they take, their communication initiatives and changes in operational policies, if any. Naturally, in testing times like these when leaders are under tremendous pressure, organisational reflexes will be results of their collective choices.

“ We developed a simple toolkit for employees to measure their well-being quotient through self-assessment, which then gives them a score for that week or month. We encourage our employees to discuss this well-being quotient report with their line leaders, agree on action plans, and obtain the support and flexibility that they need from the organisation.

- **Anuradha Razdan**,  
Executive Director (Human Resources), Hindustan Unilever and Vice President (Human Resources), Unilever South Asia

In order to build an adaptive culture, the key behaviours that leaders have focused on are:

Show empathy	Be courageous	Engage the team
<ul style="list-style-type: none"> <li>• Acknowledge how people feel - understand the human impact on them.</li> <li>• Visibly demonstrate care for people in the decisions you make and how you implement actions for change.</li> <li>• Share the 'why' behind your business decisions.</li> </ul>	<ul style="list-style-type: none"> <li>• Stand in your purpose and values to help defeat fear and uncertainty.</li> <li>• Take bold decisions.</li> <li>• Use the opportunity to accelerate necessary actions, even if unpopular.</li> </ul>	<ul style="list-style-type: none"> <li>• Be transparent in sharing the situation, challenges and opportunities.</li> <li>• Invite people to shape the ideas and contribute solutions.</li> <li>• Involve leadership at all levels to engage and communicate.</li> </ul>
Assume responsibility	Drive agility	Be transparent
<ul style="list-style-type: none"> <li>• Take personal ownership of the required transformation.</li> <li>• Acknowledge reality and focus on the next best decision.</li> <li>• Align leadership incentives to push for performance.</li> </ul>	<ul style="list-style-type: none"> <li>• Base business priorities on what customers value.</li> <li>• Accelerate the speed of decision making.</li> <li>• Focus on continuous innovation.</li> </ul>	<ul style="list-style-type: none"> <li>• Keep employees connected and engaged.</li> <li>• Continuously frame the case for change and communicate authentically with straight-talk.</li> <li>• Reassure stakeholders with actions but also showcase realistic outlook.</li> </ul>

Source: PwC analysis of data from Strategy&



## 7.2.1. Our point of view: Building organisational culture

### Considerations for organisational culture

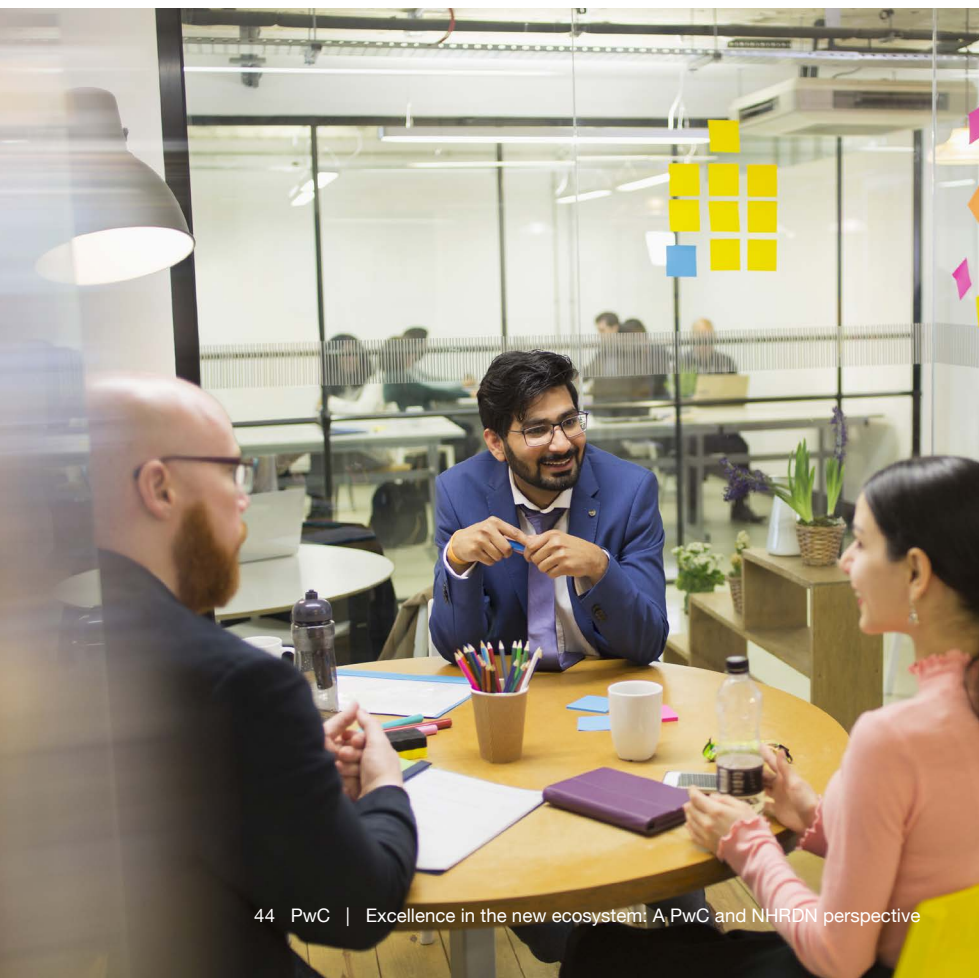


Source: Strategy&

While we look at leaders driving a few key behaviours to build the desired organisational culture, it is important, especially in these difficult times, to leverage the strength of existing organisational culture by gaining emotional commitment of the employees. This can be achieved by setting a cultural foundation with a few critical behaviours reinforced by rewards and measures that will enable new ways of working.

The following are the considerations while building your organisational culture:

- 1. Understand core cultural traits and define culture aspirations:** Align your cultural priorities with your organisational values, strategies and operating models. Identify and use your cultural strengths to overcome challenges and finally, align leaders to own the cultural shift by changing their behaviours first.
- 2. Focus on the 'critical few':** Start with behaviours and mindsets will follow. Select a 'critical few' behaviours – that will also enable your business objectives – to begin with. Enlist authentic informal leaders and start with a 'critical few' teams.
- 3. Integrate formal and informal enabling mechanisms:** Develop cross-organisational programmes to expose people to new ways of working and embed peer-to-peer interactions to build a movement. It is also critical to align all aspects of the talent management system to remind, reinforce and reward desired behaviours.
- 4. Measure results:** Demonstrate the business impact quickly through the use of pilots and experiments, and then scale. Also, actively share success stories to create a movement within the organisation.



## 7.3 Sustaining employee engagement

Engagement is an outcome of organisational culture and employee experience. Disintegrating erstwhile employee engagement models is the need of the hour since the basic underlying criteria of such models – physical presence in a brick-and-mortar office space – has now been rendered unviable due to remote working.

A majority of the surveyed CXOs say that although productivity may have dipped in the first month of remote working, there has been an increase in productivity in the past few months due to employees adjusting to the new ecosystem. Remote working allows employees the flexibility to get work done without any geographical hindrance, considerably reduces time spent in commuting and enables better workday planning. These can be considered as the few key contributing factors for such productivity spikes. But whether remote working is sustainable remains an unanswered question.

Based on our interviews, the three emerging paradigms of employee engagement are:

**Psychological engagement:** The importance of the psycho-cognitive sentiments towards the experiential benefits of employment has increased in the new ecosystem. Conversations in office corridors or at the water cooler are now a thing of the past, so it is up to the managers and the HR leaders to ensure that employees are engaged virtually.

**Diversity and inclusion:** In the new ecosystem, it has become vital to relook at the concepts of diversity and inclusion (D&I), and their impact on our ways of working. The concept of D&I has gone beyond geography, gender, ethnicity and race to include mitigation of stigmas and stereotypes. With a distributed workforce and increasing employee anxieties around job security, leaders must ensure that everyone gets an equal opportunity and D&I policies are customised as per the current industry trends. For example, organisations are optimistic about more women becoming a part of the workforce as remote working gradually becomes the new norm. At the same time, more women have lost their jobs due to the COVID-19 crisis as they are largely employed in the unorganised sector. In India, several managers do not receive any formal training on D&I. It is imperative to be trained on D&I to bring the whole D&I agenda from a 'nice-to-have' employer branding policy to the boardroom.<sup>12</sup>



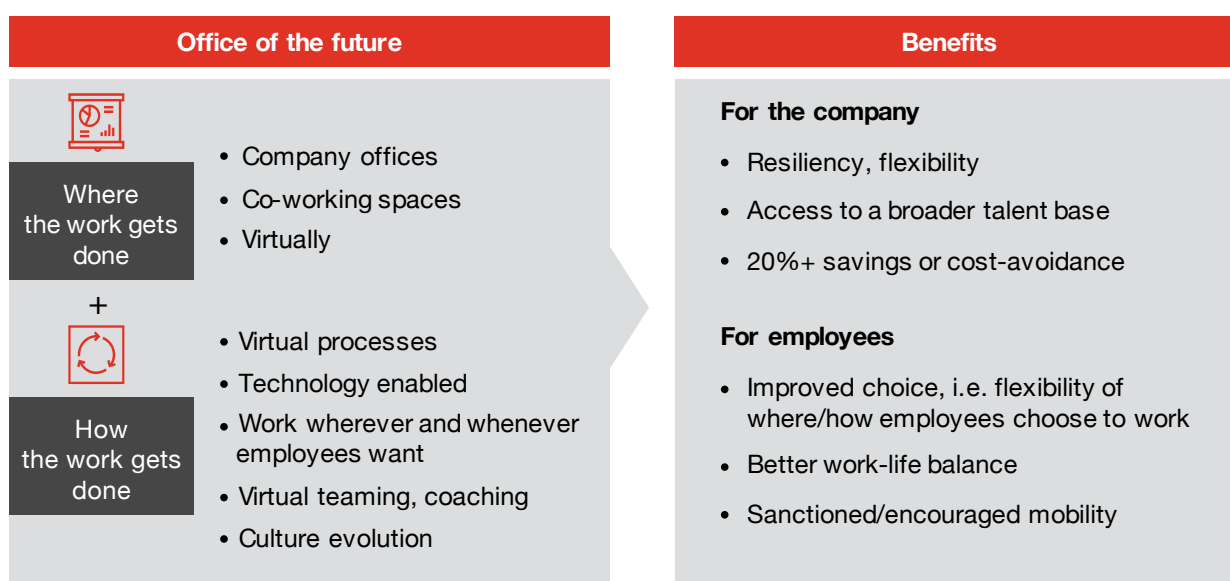
In the virtual world, hierarchies are less prominent, so generational dividends from across the workforce can be utilised effectively.

- Archana Bhaskar, Chief Human Resources Officer, DRL



**The office of the future:** An organisation's brick-and-mortar office space allowed employees to observe the organisation's culture manifest itself in its various forms – specifically, through employee behaviours and how their ways of working were influenced by their physical presence in that space. As a result, such physical spaces may have played a major role in building an organisation's culture and significantly influenced the employee engagement propositions. Hence, reinventing where and how the work gets done in the new ecosystem can provide significant value for employers and employees while they reset their cultural canvas in newer shades of the future.

## Office of the future



Source: PwC analysis of data from Strategy&

Our interactions and surveys have indicated that the remote working model will continue to be operational, even if it means that a hybrid working model becomes the norm across organisations. Thus, the role of the company/organisation office is expected to evolve to focus more on team collaboration, community building, impactful communication and coaching.

Focusing on the various levers of employee engagement virtually may be difficult for organisations. How they re-evaluate their current practices to enable the evolution of their cultural fabric will be seen in the coming months.

## Excellence in organisational culture – key insights

- Prioritise employee experience and culture over engagement.
- Reimagine the employer-employee contract to include more psychological benefits that drive a sense of purpose, belonging and care.
- Well-being, empathy, agility, resilience and transparency have become cornerstones of building an adaptive and inclusive culture.
- Drive diversity and inclusion as a strategic agenda and expand its definition to meaningfully engage employees.



## Section 8:

# Way forward



The world is going to be very volatile and our leaders' capability to deal with ambiguity and balance relationships and performance will be critical. The ability of leaders to be ambidextrous – deal with the private sector, the government and civil society – and balance all the three is going to be key. Leaders will not be able to create true shareholder value by being unipolar.

- **Shashank Tripathi**, Partner, PwC

## Future of work: The role of industry bodies and the government

To transform these emerging tides and trends across organisational design, capability and culture into opportunities, it is imperative that all players, including the Government, industry bodies and organisations, cooperate, collaborate and help uplift the status of the industry to the next level. In the current scenario, their interdependence and interrelatedness has amplified and their purpose in driving the economy, while ensuring sustainability, is well aligned as well. During our interviews with board members, CEOs and CHROs, they indicated that the Government has asked them to focus on making the overall environment more suitable for the growth of organisations. According to PwC's report 'Future of India: The Wining Leap', India is expected to build a USD 10 trillion economy by 2034.<sup>13</sup> However, during the survey, we realised that though many leaders believe that India has potential, but the belief in the country's ability to transform that potential into reality is wavering. One of the reasons for this is that there are too many separate and broken mechanisms with very little combined accountability. In the absence of combined accountability, individual mechanisms are playing their own part but there are critical gaps which require a more joint, concerted effort. Hence, it's in the interest of all – organisations, the Government and industry bodies – to solve this problem at a rapid pace as the economic effects of the pandemic have resulted in a possible contraction.

Industry bodies are an integral part of defining, shaping and driving the industry sector in India. Today, they need to play a more active role to help organisations look at the problems impacting them. Co-opetition at this critical juncture can help organisations become more innovative. For example, while the Government of India has drafted the Make in India rules and organisations have their own ambitions, the industry bodies can provide the platform that helps both the Government and organisations to work towards common goals. This requires industry bodies to play a stronger advocacy role, define the capabilities required for driving excellence in the new ecosystem and be the torchbearer to drive initiatives that contribute to a common growth agenda.

The Government is a key enabler of the future of work. Leaders who participated in our survey spoke enthusiastically about the Government's role in driving excellence in the new ecosystem by establishing the framework, advocating for it and driving compliance. A key expectation of leaders from the Government is that labour laws remain abreast with the changing economic scenario and workforce shifts. For example, leaders advocated the simplification of employment rules by relaxing the statutory requirements for providing medical insurance, ensuring minimum wage for all, upskilling opportunities, and providing food and other benefits to migrant labour. Simplicity and clarity in the Government's actions will help organisations and industry bodies partner with it more meaningfully. The leaders also stressed on the importance of changing unfriendly tax regimes, ensuring that micro, small and medium enterprises (MSMEs) are classified properly, simplifying GST rules and removing barriers to ease of doing business. They stressed the importance of creating the right business environment in terms of infrastructure, urbanisation, power and internet facilities. Regulations around product, people, safety and hygiene standards also need to be made stronger so that there is adequate balance between promoting and regulating the industry.

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13. <https://www.pwc.com/sg/en/publications/assets/future-of-india-the-winning-leap.pdf>

## Future of work: The role of the organisation

These uncertain times require immediate and long-term people-first responses as India witnessed a surge in job losses due to the COVID-19 pandemic.<sup>14</sup> This puts HR leaders at the centre of organisations' crisis response to re-evaluate leaders' core assumptions on organisational design, capability building and cultural practices that worked well during the pre COVID-19 era. HR leaders need to refocus on their roles during this period, or else organisational and economic revival may be slow. These are some of the areas that require their attention:

- Adapt to the rapid pace of execution through a distributed workforce and dynamic organisational design so that the approach to execution itself becomes decentralised and localised.
- Support organisations in adopting a principle-based execution to be agile and build a collaborative mindset within the organisation. They should also involve other players outside of their business ecosystem to drive inclusive growth.
- Look at upskilling existing talent as against buying or borrowing as there is an imminent shortage of skills in the digital world. Also, consider new roles that are emerging, leading to the need for both digital- and human-centric skills.
- Consider the interconnectedness of the organisation and leadership capability building as a continuum and reflect the changing paradigm of leadership, thereby giving importance to whole leadership, empathy and resilience.
- Focus sharply on delivering a positive employee experience and reinventing the organisational culture. Also, address emerging employee expectations through the provisions of flexibility, health and wellness benefits as well as remote working support. By redesigning office spaces and telecommuting models, employers have already begun their journey towards transforming their organisations into those of the future.
- Track the response of cultural evolution in organisations through enhancement of employee engagement to understand the extent of fulfilment of psychological contracts between them and their employers.

The above considerations can help create a bond forged out of mutual trust and respect among business leaders, HR leaders and the workforce to create a sustainable environment for business continuity. HR leaders can help businesses and employees emerge stronger from this crisis and prepare for any challenge presented by the new ecosystem.

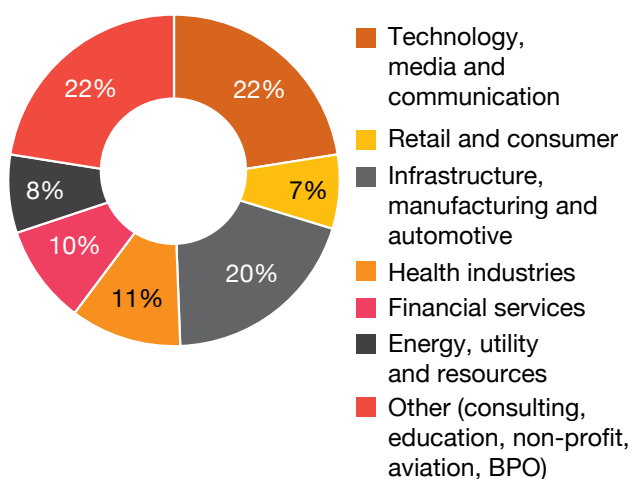
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14. [https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/briefingnote/wcms\\_740877.pdf](https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/briefingnote/wcms_740877.pdf)

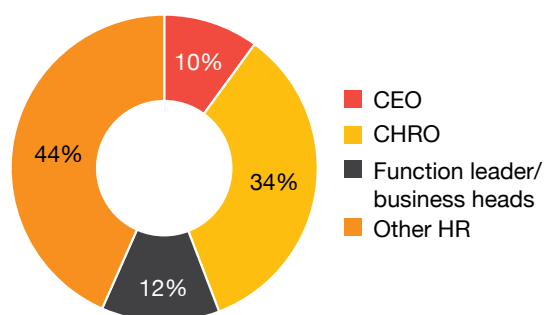
# Appendix

## Research methodology

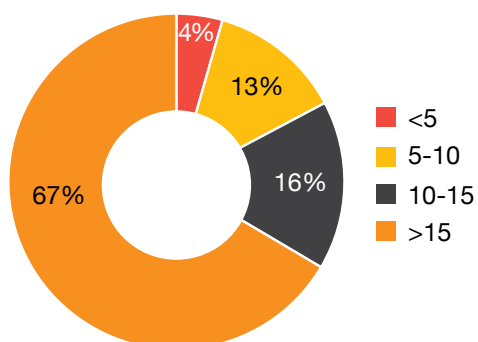
### Industry-wise division



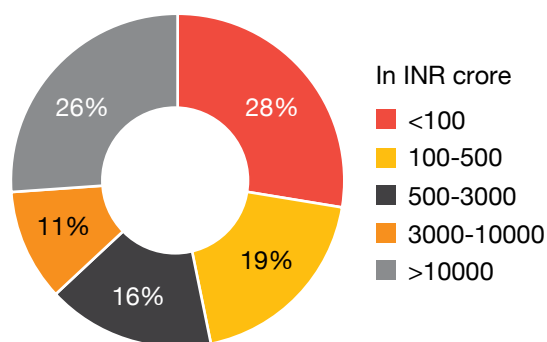
### Role-wise division



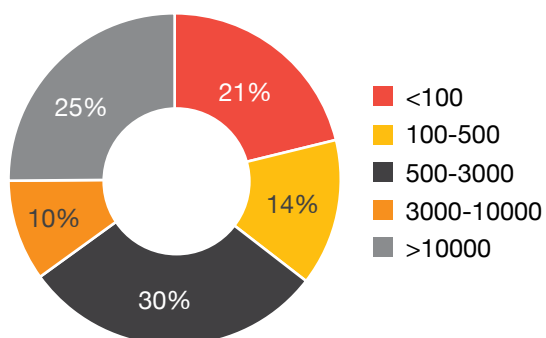
### Years of experience



### Annual turnover



### Number of employees



# List of interviewees

Name	Designation	Organisation
<b>Ajanta Chatterjee</b>	Group Head, Talent, Learning and Culture	JSW Group
<b>Amit Malik</b>	Chief People, Operations and Customer Services Officer	Aviva Life Insurance
<b>Amit Sharma</b>	Vice President and General Manager (Operations, WW GBS - Cloud Appl Innovation and Global Delivery)	IBM
<b>Anuradha Razdan</b>	Executive Director (Human Resources), Hindustan Unilever and Vice President (Human Resources), Unilever South Asia	Unilever, Hindustan Unilever
<b>Archana Bhaskar</b>	Chief Human Resources Officer	Dr. Reddy's Laboratories
<b>Ashok Menon</b>	Ex-Chief Human Resources Officer and Head of Corporate Communication	G R Infraprojects
<b>Ashok Ramchandran</b>	Group Executive President, Human Resources	Aditya Birla Group
<b>Avantika Susan Nigam</b>	Director and Head of Human Resources, Global Business Services, India Hub	PepsiCo Global Business Services
<b>Avishkar Mehrotra</b>	Chief People Officer	Walmart
<b>Binu Mathews</b>	Human Resources Director	HP Inc.
<b>Dhirendra Nath</b>	Chief Human Resources Officer	SLK Group
<b>Dr. Jignesh Shah</b>	Vice President, Human Resources	Montecarlo
<b>Dr. Pradip K. Dutta</b>	Group Vice President and Managing Director, South Asia	Synopsys
<b>Dr. Prince Augustin</b>	Executive Vice President, Group Human Capital and Leadership Development	Mahindra & Mahindra
<b>Dr. Sujatha Sudheendra</b>	Head of Human Resources	Aditya Birla Finance
<b>Dr.Aquil Busrai</b>	Chief Executive Officer	Aquil Busrai Consulting
<b>Hirak Bhattacharjee</b>	Head of Human Resources	Aditya Birla Sun Life Mutual Fund
<b>Indira Sovakar Screymour</b>	Sr. Vice President, Human Resources	Genpact
<b>Ketan Patel</b>	Managing Director	HP Inc.
<b>Krish Shankar</b>	Group Head, Human Resources	Infosys
<b>Lakshmanan M.</b>	Chief Human Resources Officer	L&T Technology Services
<b>Magesh M S</b>	Head of Human Resources	Société Générale Global Solution Centre

Name	Designation	Organisation
<b>Mukta Nakra</b>	Head of Human Resources and Sustainability	Marks and Spencer Reliance India
<b>P Dwarkanath</b>	Former Chairman	GSK Consumer Healthcare
<b>Pavitra Singh</b>	Chief Human Resources Officer	PepsiCo
<b>Pia Shome</b>	Head of Human Resources	SMECorner
<b>Piyush Mehta</b>	Chief Human Resources Officer	Genpact
<b>Rachna Mukherjee</b>	Chief Human Resources Officer, Greater India	Schneider Electric
<b>Rajeev Dubey</b>	Group President (HR and Corporate Services) and CEO (After-Market Sector), Member of GEB	Mahindra & Mahindra
<b>Rohit Saboo</b>	President & CEO	National Engineering Industries
<b>Rohit Sawhney</b>	Chairman and Managing Director	India Ratings & Research
<b>Romy Sahay</b>	President, Human Resources	Deepak Fertilisers And Petrochemicals
<b>S. Y. Siddiqui</b>	Chief Mentor	Maruti Suzuki
<b>Sabyasachi Bhattacharya</b>	Chief of HR and IT	Phillips Carbon Black
<b>Sandesh Kamath</b>	Deputy General Manager	Bagmane Group
<b>Sanjay Srivastava</b>	Human Resources Director	Boehringer Ingelheim
<b>Saurabh Govil</b>	Chief Human Resources Officer	Wipro
<b>Seema Nambiar</b>	Sr. Vice President - Marketing and communications, People resources	McDonald's
<b>Shreya Bhagwanth</b>	Head of Human Resources, India Region	3M
<b>Sunil Ranjhan</b>	Sr. Vice President, Human Resources	Maruti Suzuki
<b>T K Srirang</b>	Head of Human Resources	ICICI Bank
<b>Vivek Mukherjee</b>	Director & Head of Human Resources	Benetton

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