YOUR LEGACY OR YOUR LEGEND?
A CEO’s guide to getting the most out of new technologies

Provocative thinking, transformative insights, tangible outcomes
H. James Wilson is global managing director of IT and Business Research at Accenture Research, where he leads global research programs on the impact of technology on work.

Wilson is co-author of the best-selling book, Human + Machine: Reimagining Work in the Age of AI (Harvard Business Review Press). He is author or contributing author of eight books on the impact of technology on work and society, including most recently, AI, Analytics, & The New Machine Age (HBR Press 2019) and How to Go Digital (MIT Press 2019).

Wilson wrote “The Jobs Artificial Intelligence Will Create,” MIT Sloan Management Review’s #1 Most-Read article of 2017, and is a longtime contributor to The Wall Street Journal and HBR. His latest HBR article is “The Future of AI Will Be About Less Data, Not More”.

About the authors

Paul Daugherty
Chief Technology & Innovation Officer, Accenture

Paul Daugherty is Accenture’s chief technology & innovation officer and leads the company’s Technology Innovation & Ecosystem group. He is also a member of Accenture’s Global Management Committee. In addition to overseeing Accenture’s technology strategy, Paul is responsible for driving innovation through R&D activities in Accenture Labs and for leveraging emerging technologies to bring the newest innovations to clients globally.

Paul founded and oversees Accenture Ventures, which is focused on strategic equity investments and open innovation to accelerate growth. He also leads the company’s large group of highly skilled, certified technology architects, who apply new technologies and architectural foundations in building solutions for clients across industries. In addition, Paul is responsible for managing Accenture’s alliances, partnerships and senior-level relationships with leading and emerging technology companies, and runs Accenture’s Global CIO Council and Forum.

Bhaskar Ghosh
Group Chief Executive, Accenture Technology Services

Dr. Bhaskar Ghosh is group chief executive, Accenture Technology Services. In this role, he directs strategy and investments for Accenture Technology Services, and leads platforms, products, global technology delivery, and intelligent cloud and infrastructure services. His focus is to enable enterprises to embrace digital disruption, drive growth through innovation and reinvent their application portfolio. Ghosh and his organization help enterprises transform their business through the adoption of New IT, spanning strategy, technologies, architectures, platforms, methods, organization and operating models.

Under Ghosh’s leadership, Accenture Technology Services has rapidly rotated to the New. More than 180,000 Accenture Technology people have been trained around the world in New IT, including automation, agile development and intelligent platforms. Ghosh has been awarded patents in multiple areas, including IT automation. He is a member of the Accenture Global Management Committee.

James Wilson
Global Managing Director, IT & Business Research, Accenture Research

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About the authors
Today, all companies are tech companies; all CEOs are tech CEOs.

No matter your industry or business model, the technology path you choose now will determine more decisively than ever your company’s financial success.

This Guide is based on the largest study of enterprise systems to date. It will enable you to chart the optimal path. Specifically, it provides an incisive approach against which you can test the five key decisions you must make to realize the full value of your company’s investments in leading-edge technology.

We call the approach Living Systems. It accelerates transformational impact and increases business value and outcomes. It ensures that a business remains relevant, vibrant and successful in a constantly evolving world.
Getting on the Optimal Path

Be prepared for whatever is around the corner.

Introducing PATHS: a clear decision model for CEOs making long-term IT investments.
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## Getting started with Future Systems: Three essential steps
Consider three identical old houses, each with a different owner. The first owner paints the walls of two bedrooms, while the second more ambitiously renovates three bathrooms. The third overhauls the aging electrical and plumbing systems, making the entire house more energy efficient, and then opens for business as a bed and breakfast.

Thinking systematically, instead of in a piecemeal fashion, is the way to make the most of what you have. It’s also the way to support something new. This is as true for the CEOs of large companies as it is for independent homeowners.

Like the first homeowner, CEOs looking to seize an opportunity often implement one or two new technologies in one or two business units. Or, like the second, they make bigger and bolder changes that improve certain areas—for a while.

Then there are those leaders who think as the third homeowner does. These CEOs apply adaptable technologies across their entire enterprise, positioning it to keep evolving and growing.
RIGHT TECH, WRONG APPLICATION

Are your tech investments failing to create real value?

Thinking about technology in terms of systems has become vital because all companies today are technology companies. Every business in every industry is turning to technology-based innovation to disrupt the competitive status quo. But according to our research—the largest study of enterprise systems to date—the vast majority of companies are failing to realize full value from their investments in technology. Many aren’t even close.

And it’s because most are behaving like the owners of those first two houses. They’re making seemingly reasonable tech investments. They may even be realizing some modest successes. But as these less-than-ideal choices add up, they’re actually making it more difficult by the day to keep the entire organization on pace to perform at a high level. They’re creating what we call an “innovation achievement gap”—the difference between the potential and realized value of their efforts.

The vast majority of companies are failing to realize full value from their investments in technology.
BIG SPENDER
LOW EARNER?

Isolated tech investments lead to lower returns

Why does it happen? Primarily due to fragmented decision-making. Compelled to move as rapidly as possible, C-level executives are putting business unit, product or geography heads in charge of the tech investment decisions affecting their areas. It works well in the short run. But it results in several (or many) fully rooted, highly customized systems operating in isolated pockets of the organization.

These systems cannot work with each other—at a time when the nature of technology innovation is becoming increasingly dependent on platforms and large varieties of connected data to fuel artificial intelligence (AI) systems. As a result, information that might spark innovation isn’t shared. Highly successful pilots aren’t scaled across businesses. And it gets harder and harder to update or modify each system to perform (even in isolation) because they’ve all become so customized.

Meanwhile, as CEOs grow more distanced from tech investment decision-making, they are less able to ensure their organization’s security and sustainability.

For CEOs under relentless pressure to transform and grow their companies, it’s a frustrating state of play. Seventy percent of the 885 CEOs in our study believe they are very knowledgeable about their organization’s investments in innovation. Yet their companies continue to fall behind competitors.

If they stay this course, they run a real risk of failing. They need to get on a path to Future Systems. It’s a radically different approach—and an innovation and value multiplier.

CEOs need to get on a path to Future Systems. It’s a radically different approach—and an innovation and value multiplier.
The leadership has sailed

Leaders vs. Laggards and Middlers: Innovative companies are pulling away from the pack

To determine what an optimal tech investment path should look like, we first surveyed more than 8,300 companies. We identified those that were getting the most out of their technology investments (“Leaders”) and those that weren’t (for detail on our methodology, please see Sidebar: Our methods, our ratings).

Representing just 10 percent of the overall study group, Leader companies grow revenues at more than twice the rate of those in the bottom 25 percent (the “Laggards”) (see Figure 1). And Leaders’ revenue growth rates are continuing to increase, rapidly widening the gap between these two sets (see Figure 2).

In 2018, for example, Laggards left 15 percent of their potential annual revenue behind. If both Leaders and Laggards continue their current trajectories, Laggards will leave 46 percent of their potential annual revenue on the table in 2023.

Our methods, our ratings

Our study involved engaging with C-level executives at more than 8,300 companies across 20 industries in 20 countries. Half of these executives were in IT roles, and half were in non-IT roles; 885 were CEOs.

We collected data on the companies’ adoption of certain technologies, those technologies’ penetration (the extent to which they were in use through the company), and the culture changes (for example, changes in mindset around experimentation and collaboration) that the companies made as they adopted those technologies. We then scored the companies on those three factors, calling the top 10 percent “Leaders” and the bottom 25 percent “Laggards”. The companies that fell between the 40th and 60th percentile became our “Middlers”.

Just 8 percent of our CEO respondents represented companies in the Leaders group.
Meanwhile, the "Middlers" (the middle 20 percent of the companies we studied) grow revenue at more than one-and-a-half times the rate of Laggards. But that’s cold comfort. Leaders still grow revenue more than 50 percent faster than Middlers. What’s more, our modeling shows that in 2023, a Middler staying on its current path will end up forgoing as much as one quarter of its annual revenue.

That means a Middler making $10 billion in annual revenue in 2015 would have lost $2 billion in unrealized value in 2018. In 2023, if it doesn’t change its course, it will lose another $13 billion (see Figure 2).

**Figure 1: Leaders enjoy superior revenue growth.**

![Leaders Middlers Laggards](source: Accenture Research. Based on average self-reported annual growth rates for 2015-2018.)

**Figure 2: Leaders will extend their advantage over Middlers and Laggards.**

Leaders’ expected growth is represented by the purple line, Middlers represent the dark blue line and Laggards the pale blue line (self-reported). This illustrative model shows the opportunity cost of not evolving to Future Systems, using a company with $10 billion in revenue in 2015.

For Laggards, $3 billion was forgone in 2018. But even Middlers left nearly $2 billion on the table.

<table>
<thead>
<tr>
<th>Leaders</th>
<th>Middlers</th>
<th>Laggards</th>
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<tbody>
<tr>
<td>$20 billion will be lost in 2023 by Laggards.</td>
<td>$13 billion will be at stake.</td>
<td>Gap = 46%</td>
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<td>Gap = 23%</td>
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Introducing PATHS: Your guide to successful tech investments
FORESEE THE FUTURE

Our decision model helps CEOs avoid value dead-ends

We then dug deeper to find out what set Leaders apart. The primary differentiator, we found, is the CEO’s view of the purpose and the promise of technology investments. Leaders believe that their companies’ technology systems should be boundaryless, adaptable and radically human (see Table 1 and Sidebar: Boundaryless, adaptable and radically human).

Table 1. Key features of Future Systems.

<table>
<thead>
<tr>
<th>Strategic Attributes</th>
<th>Key Points</th>
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<tbody>
<tr>
<td><strong>Boundaryless</strong></td>
<td>Boundaryless systems blur boundaries between:</td>
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<tr>
<td></td>
<td>• The IT stack (data, infrastructure, applications)</td>
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<td></td>
<td>• Humans and machines</td>
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<td></td>
<td>• Organizational and industry silos</td>
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<tr>
<td><strong>Adaptable</strong></td>
<td>Adaptable systems provide scalability and strategic agility:</td>
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<tr>
<td></td>
<td>• They seamlessly adapt to business and technology change</td>
</tr>
<tr>
<td></td>
<td>• They have flexible, living architectures and new ways to protect and nurture data</td>
</tr>
<tr>
<td><strong>Radically human</strong></td>
<td>Future Systems can be radically human:</td>
</tr>
<tr>
<td></td>
<td>• They empower humans to interact with machines, e.g. through natural conversation and simple touches</td>
</tr>
<tr>
<td></td>
<td>• They adapt to humans, not the other way round</td>
</tr>
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Boundaryless, adaptable and radically human

Future Systems are boundaryless, adaptable and radically human.

**Boundaryless** systems break down barriers—within the IT stack, between companies, and between humans and machines. That gives businesses near-infinite opportunities to improve how they operate.

**Adaptable** systems, powered by advances in trusted data and intelligent technologies, seamlessly adapt to change. They minimize friction, scale innovation, and learn, improve and adapt on their own.

**Radically human** systems can talk, listen, see and understand the way employees do their work and customers engage. With these systems, machines adapt to humans, not the other way around.
Leaders understand the need for blurred lines in the technology stack (data, infrastructure and applications). They see how unravelling tightly integrated systems makes them more flexible. They understand that by minimizing the differences among processes, their company will be better able to leverage all of its data. And they believe that these elements add up to strategic agility (see Figure 3).
Critically, our research also revealed the five key decision points where this CEO perspective translates directly into optimal investments. They are Progress, Adaptation, Timing, Human + Machine Workforce, and Strategy (PATHS). Making the right choices in these areas is how leaders build Future Systems—and get the maximum value out of their efforts.

At each juncture, Leaders pursue the action that will create a building block, one that will allow the organization to share and scale innovations repeatedly across business units and processes. Laggards, by contrast, most often choose easy fixes that create siloed systems—sometimes they fail to decide at all, letting the status quo prevail. And Middlers tend to mix and match, which is also costly, even if it achieves “good-enough” results over the short term.

Table 2 shows the five decision points along with the three options that a company might consider at each.

At each decision point, the first two options represent the seemingly good decisions that a Laggard or a Middler would make. The third represents the more difficult, but optimal, Leader’s choice.
Table 2: Five decision points, three options, one optimal choice.

<table>
<thead>
<tr>
<th>Decision points</th>
<th>Tempting and tough decision options</th>
</tr>
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| **Progress:** How extensively/broadly should we apply new technologies to evolve business processes across the enterprise? | Option 1: Transform low-hanging business processes, e.g. customer-facing processes  
Option 2: Build innovation centers/hubs to transform multiple processes  
**Optimal Option:** Reimagine business processes for the future and target multiple processes with the same technologies |
| **Adaptation:** How do we adapt our current IT investments to changing business needs? | Option 1: Patch legacy systems  
Option 2: Lift-and-shift to the cloud  
**Optimal Option:** Decouple from legacy and transform with the cloud |
| **Timing of Tech Adoption:** How do we properly sequence and map our adoption of new technologies? | Option 1: Experiment with new technologies on the leading edge  
Option 2: Double down on industry-specific, customized technology  
**Optimal Option:** Identify fundamental (general purpose) technologies, prioritize their adoption in terms of timing and processes targeted |
| **Human + Machine Workforce:** How do we activate and enable the workforce to use and be augmented by technology? | Option 1: Rely on traditional, periodic training about new tech (standardized classroom or online learning modules)  
Option 2: Individualize training, allowing employees to learn at their own pace  
**Optimal Option:** Deliver tech-augmented training for working with technologies of the future (AI, XR and experiential, personalized) |
| **Strategy:** How can we intentionally manage the intersection of business strategy and technology strategy? | Option 1: Allow business units to rapidly, and independently, address their pain points  
Option 2: Devise a technology strategy to explore ambitious business goals like new business models or adjacent markets  
**Optimal Option:** Build boundaryless, adaptable and radically human IT systems that explicitly enable scale and strategic agility |
Progress

How extensively do you plan to apply new technologies across the enterprise?
New technologies, including AI and cloud, open up almost limitless possibilities for transforming business processes by lowering prediction and computation costs. Yet Laggards and even Middlers generally choose to apply them to just a few processes, usually in marketing and sales.

Even when companies create hubs and blur organizational silos, they don’t establish connections from hubs to other parts of the organization or value chain. As a result, they have no way to transfer innovations across the enterprise, limiting the value they can get out of them.
WHAT YOU KNOW WON’T HELP YOU GROW

The longer you cling to existing systems, the less you grow

Our survey indicates that Leaders transform two times as many processes as Middlers and three times as many as Laggards. And when considering each process, Leaders also ask what other processes might leverage the same technologies. They’re always looking at the broader implications of one investment.

Marriott International offers an example: Facing disruptive changes in consumer preferences, the 91-year-old travel giant decided to be progressive and overhaul many aspects of its business.

Subsequently, Marriott custom-designed a 12-week program involving the startup incubator 1776, to assess, select and pursue the best ideas to pilot and implement. Of the 160 applications put forth for consideration, seven qualified for the incubator. And in less than nine months, the company went from ideas to implementation, successfully diversifying into the home-share business and reimagining the customer and operational processes through which people make travel plans.1
Can your current IT investments adapt to changing business needs?
Ensuring that IT systems can adapt and respond to changing market conditions seems like an obvious priority. However, in most companies, it’s not. Driven by security concerns, for example, Laggards may choose to patch a legacy system. While patching works in the moment, it treats a symptom rather than the underlying problem.

Lifting and shifting applications to the cloud—the choice of many Middlers—is better, but still suboptimal. Migrating to the cloud reduces data storage and computation costs. But it doesn’t provide strategic agility.
Eighty-three percent of Leaders in our study agreed that it is important to decouple data from legacy infrastructure, compared with 61 percent of Middlers, and just 37 percent of Laggards (see Figure 4).

Leaders see the cloud not simply as a data center. They see it as a catalyst for innovation across silos and businesses.

To diversify into the home-share business, for instance, Marriott adopted a platform strategy, enabled by cloud-based systems, that allowed it to bring together leading property management companies across multiple locations under one Marriott brand: Homes & Villas.2

With this approach, Marriott has developed an ecosystem of partners, giving it an edge over some competitors that have chosen the alternative route of acquiring home-share businesses.

Leaders see the cloud not simply as a data center. They see it as a catalyst for innovation across silos and businesses.
Timing

What is your sequence, roadmap and timeline for the adoption of new technologies?
Don’t wait and see
Investing in the right tech at the right time brings big rewards

Laggards and Middlers take a wait-and-see attitude. That’s what we found when we asked the companies in our study about their adoption of 28 different technologies. It’s a small sample of the new tech available right now. But it was enough to show that while most companies hold back, Leaders leap.

Most Laggards, for example, experiment with new tech on the leading edge, but do not plan or follow through with the innovations of new technologies into their core processes—this decreases returns. Middlers might engage in experimentation at the edge and also double down on industry-specific, customized tech—but this locks companies into certain technologies and can inhibit their ability to combine them in the future.
Leaders adopt more new technologies than the rest, faster than the rest. They’re also ready with the supports needed to capitalize on them. Consider SaaS, software-as-a-service through the cloud. About 20 percent of Leaders adopted SaaS five years ago, compared to 9 percent of Middlers and 8 percent of Laggards. Today, nine-tenths of Leaders are confident of their SaaS expertise, compared to 71 percent of Middlers and 29 percent of Laggards (see Figure 5).

McDonald’s understands well that the future of its business hinges on the timing of tech adoption. In 2019, this iconic fast-food business made two acquisitions aimed at quickly bringing a suite of new technologies into its customer experiences and operations. First, to better tailor its customer offers, it acquired Dynamic Yield, a machine learning (ML) platform for customization.

Dynamic Yield’s technology can change the drive-through menu based on the time of the day and weather, among other factors. That leaves upselling to the tech so employees can focus on service.² McDonald’s second acquisition, Apprentice, also makes each interaction with the customer personal and seamless—through conversational AI.³

Figure 5: Leaders have more confidence in their SaaS expertise.

Source: Accenture Research.
Human + Machine Workforce

How will you enable your staff to be augmented by technology?
The most tempting choice for Laggards is to rely on time-tested, one-size-fits-all training regimens. That’s because they often believe that they can recruit already-trained professionals when new skills are required. But the reality is that skills now rapidly reach obsolescence, and job descriptions evolve faster than ever.

Our study respondents believe that in the absence of reskilling, 52 percent of their IT workforce’s skills, and nearly half—47 percent—of their non-IT workforce’s skills will be obsolete in three years.

Middlers prefer to match employees’ individual needs to the most appropriate training modules. But this approach does not explicitly address the need for employees to be able to work with advanced technologies of the future.
MACHINE LEARNING, DESIGNED FOR HUMANS

Let tech train and upskill your staff

Eighty-six percent of Leaders use experiential learning in combination with intelligent technologies such as AI, analytics and ML to predict and match worker training with required job skills and even rewrite job descriptions, compared to 60 percent of Middlers and 35 percent of Laggards (see Figure 6). Leaders use technologies to make work more engaging while simultaneously realizing efficiency gains. Critically, these activities strengthen their relationships with employees.

Consider CVS Health, which is increasingly using algorithms to analyze and improve store operations and patient interactions: By the end of 2021, for example, CVS Health plans to launch 1,500 HealthHubs that will use data to offer services such as ongoing care for people with diabetes, dietary guidance and sleep assessments.5-10

To make the transition to an algorithm-driven workplace, CVS Health is committed to training and upskilling. For example, pharmacy technicians receive a combination of personalized digital training and real-world simulations to help them become more tech savvy and data literate. Training for in-store employees similarly uses a combination of tech and human-based instruction.

CVS Health has also designed training programs to identify and leverage individual strengths, so that, for example, a person with disabilities can contribute to their fullest extent. And, at its regional training centers, the company runs development programs explicitly geared to the needs of potential employees who may need extra support while developing skills for the new retail environment. Retention rates are higher for CVS Health’s “health colleagues” who have participated in a regional learning center program, than they are for other employees.

Figure 6: Leaders use experiential learning in combination with intelligent technologies.
Source: Accenture Research.
How will you align business strategy and IT strategy?
The decisions about Progress, Adaptation, Timing and the Human + Machine Workforce converge in the fifth and final decision point: Strategy. How a company weaves its technology investments together will ultimately determine how prepared it is to preempt disruption and seize opportunities.

When Laggards allow business units to address their specific pain points (the first option), they are effectively democratizing IT. This approach allows the units to move swiftly. But it leads to “shadow IT” managed by people outside of the IT department. As a result, systems can’t operate with each other, inhibiting strategic agility.

The same goes for concentrating on entering adjacent markets or exploring new business models. The problem is that disruption can come from anywhere, not necessarily the markets that a company explores.
Leaders, by embracing a tech strategy built on systems that are boundaryless, adaptable and radically human, position their organizations to become increasingly agile and able to innovate at scale within the enterprise. By taking this approach, for example, they can—and do—manage technology investments and track their value, even for areas that are relatively new.

Ninety-four percent of Leaders track the value of AI-based automation, versus 76 percent of Middlers and only 47 percent of Laggards (see Sidebar: Creating value through trust—with data and people, which notes how Leaders’ attention to data integrity yields better decision-making).

By acquiring tech companies, McDonald’s is betting big on foundational technologies such as AI and ML as it rethinks its interactions with customers. With its platform play, Marriott is reinventing not only specific business processes but also its business model. And with its training programs and planned enhanced services, CVS Health is relying on the Human + Machine Workforce to ensure that employees adapt to a changing world while customers receive increasingly personalized care.

Creating value through trust—with data and people

In order to get the most out of their investments in innovation, Leaders are deliberately meeting the needs of stakeholders by building trust and creating new forms of value with data.

Leaders see trust in data as paramount. They work to ensure that it is of the highest quality (i.e. representative and unbiased). As such, the vast majority treat it as a valuable asset, with 94 percent trusting it and using it to inform business decision-making. Far fewer Middlers do this (81 percent). And the percentage of Laggards that ensure that their data is trustworthy and use it to inform decision-making is even lower (64 percent).

Figure 7: Far more Leaders track the value of AI-based automation than Middlers and Laggards.

Source: Accenture Research.
Getting started with Future Systems: Three essential steps

Not yet on the PATHS to Future Systems? Here’s how to set yourself up for success so you’ll be ready to face decisions at every juncture:

Assess your company’s current position

Identify the technology investments that are specific to processes, geographies and functions. Measure their diminishing returns and opportunity costs.

Reconsider your sunk tech investments

What investments can be consolidated or applied across other parts of the business to drive efficiencies and improve returns? Take this step along with your IT leads (including your Chief Digital Officer, Chief Information Officer, Chief Analytics Officer and, if you already have one, your Chief AI Officer). Also align around a set of KPIs to track progress.

Design a new Future Systems strategy

One that is based on enterprise-wide needs and can adapt to the changing nature of employee, partner and customer habits. Demonstrate the financial case in terms of contribution to margin and revenue growth. Revisit the PATHS framework as you face each new tech investment decision. Remember that it isn’t enough to make reasonable decisions. Nor is it enough to be aligned with your IT leaders on decisions. There’s a real danger that you will all be agreeing on a seemingly justifiable, but suboptimal, choice.
Leaders have a head start and they won’t be standing still

Companies that wait to build Future Systems will find it increasingly difficult to catch up as technologies evolve and the pace of innovation accelerates. It’s time to become a Leader.

Or, to put it metaphorically, it’s time for companies to think bigger than a coat of paint or a renovated room. It’s time to pursue a completely new way of living in their entire house—and create more value with it.

Leaders enjoy a considerable head start, and they will not be standing still. The systems they have in place are specifically designed not only to accommodate innovations in technology and its application, but also to create those innovations and to scale them across the enterprise. Yours should too.
We define “scale” by building on the traditional definition found in business economic literature: A transfer of innovation across the enterprise such that the input required to create an innovative product or service produces a tenfold or more output than was initially the case.

Acknowledgments

The authors would like to thank Prashant Shukla, PhD, the Research Lead for Future Systems, as well as Surya Mukherjee and David Lavieri from Accenture Research for their contributions to this report.
About Accenture

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