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LEADERS WANTED
VIDEO TRANSCRIPT

Announcer:
Live from the Accenture digital briefing center, welcome to the 21st annual Technology Vision with your host Marc Carrel-Billiard.

Marc Carrel-Billiard:
Welcome everyone to the Accenture Technology Vision 2021 launch event.
My name is Marc Carrel-Billiard and I'm leading the R&D organization for Accenture globally. I'm delighted to have you attending these events today and I know that in this very special moment we're all living, technology is at the center of the way we live and the way we work. Hence we had to reinvent our launch event and we are welcoming you from all over the world using this virtual event. For sure we would have loved to been face-to-face like
we do every year as we've been launching this Technology Vision for
21 years now but that's just the way it is.

So thanks again for joining from wherever you are and I'm looking forward to this exciting agenda that we have for you for the next hour. We have a great agenda ahead of us. Paul will share the technology with us, then we will have a panel discussion when we can delve a little bit more on the different technology trends, and then after the panel discussion we're
pretty lucky because we have two clients. We have Yvonne Wassenaar, who's the CEO of puppet and we have Filippo Catalano, who is the incoming chief information and digitalization officer of Reckitt Benckiser. And both of them will share their perspective related to the Technology Vision.

Before I bring Paul on stage, I'd like to give three

tips on how you're going to be interacting with us during the launch event. First you're going to see that ask a question submission button that you can leverage to ask your question live. Second you'll see that there will be also live polling. You can answer polling questions by leveraging the pop-up window that you'll see on the right side of your screen. And last but not least, we'd like you to continue interacting with us during the event and after the event by sharing your post on social media using #TechVision2021.

It is now my pleasure to invite Paul on stage. Paul is my boss and he's my friend. He's been leading and advising our Technology Division for the last
10 years and Paul is our chief technology officer and leads technology globally within Accenture. So you can imagine that he has a pretty good perspective about our technology trends. Over to you Paul.

Narrator:
With a bang, energy and change came to every part of our universe, seismic or small it continues. Change is all around us. Shaped by technology and human ingenuity, we can make it work for you and your business.

Paul Daugherty:
Thanks Marc and welcome everyone to Technology Vision 2021. You know this is the 21st year we've been doing the Vision and it's been a remarkably accurate predictor of the important trends that leaders need to follow as you chart your course to the future and we hope it'll be the same experience for you this year. And one thing that's always important to start

with before we get into the Vision is the context in the world around us and wow do we have a lot to talk about given what's happened over the past year. So let's just stop and reflect on that for a moment. And on the screen you'll see some of the images just reminding us of what we've experienced in the past year.

Not too long ago it was Brexit that we were talking about. Australian wildfires causing concern and discussion around the warming of the planet.
Geopolitical tension, China, US, Iran, North Korea, in new ways and new forms of conflict and then boom: Covid hit.

Unprecedented disruption, catastrophic health consequences, personal implications, you know, personal real consequences for all of us. But that wasn't all. Systemic social injustice and racism were center stage, political chasms and tension, new security risks, SolarWinds and other things causing new concerns and new risks as we think about our businesses.

So if you look at all that it creates a picture of volatility, uncertainty and as leaders we need to figure out how to manage our way through that and that's what we're going to talk about. And I think a key thing to understand, as we think about this is the new mindset that's required. And the mindset we need to think about is that we've really, you know with Covid what happened is Covid hit the giant fast forward button and it fast forwarded us into the future at a new pace. Ten years of transformation compressed into one or two years. You know we're in the future but we just haven't caught up yet and that's really what we're talking about in the Vision. How do we catch up? How do we change that mindset? And as you think about catching up, this is a real issue for business.

Before Covid we had done this work around what's happening with digital and we found that there was a digital achievement gap. The leaders in any given industry with digital who are using technology more effectively, you know, the top 10% of leaders outperformed the rest by a factor of 2x. What happened when the fast forward button got hit during Covid? The gap widened, the top 10% outperforming by five times. And this is a stark reality and a stark realization for many companies, for many leaders, as they think about what do they do next in this new environment?

And it's bringing about this moment of truth as you confront where you are. And you also need to digest what I think are four new realities about this future, that we need to digest and incorporate as we go forward. So let me walk through these real quickly for you.

The first new reality is human experience. Think about what happened, eight billion people around the world instantaneously changed their behavior. Never before has something like this happened in the history of human civilization. In the US less than 40% of people pre-Covid did online grocery shopping. Within a couple of months 80%, more than double, we're doing online grocery shopping, 350-fold increase in telehealth visits. And think about the way we're working and communicating with family, friends, colleagues. We're being teamed, zoomed, webexed, hung out, depending on the platforms you use. And this is the new mode of interaction, I don't think we've yet appreciated what this really means for human experience and this is something we all need to deeply understand and reflect in how we go forward.

The second new reality is the new reality around technology and I'll summarize this very simply: every business is a technology business and that's something we all need to think about and reflect in how we approach the world going forward. This is true because to be a leader in digital, to address that achievement gap I talked about, you need to be as good at technology as digital natives, as digital giants. Everybody needs to have that technology capability. Every business must be a digital business. Think about what happened in Covid as well. Technology was the lifeline that kept
things running, that kept things operating, kept us all connected. If Covid happened five years

ago it would have been far more devastating and had far more severe consequences given the state of technology. And if you think about it then you know the role of technology going forward is very different.

I'll use an analogy many of you may appreciate: a rock concert. The way I think about it is you know IT and technology used to be the roadies. They were off the stage, supporting the show behind the scenes. With Covid and now this role of technology going forward, technology really is the star on the stage. It's center stage and that's something we need to reflect in our businesses as we look at the role of technology and the technologists that we have in the business. You know you can see this in a number of ways too. Look at, for example, Starbucks and how they handled the Covid crisis compared to their competitors. Looking at this achievement gap, Starbucks immediately introduced some new digital capability. A new app, millions of new application downloads, new capabilities that allowed them to switch quickly to 90% of their orders being remote and then picked up in stores. APIs, microservices, architecture allowing them to partner quickly with UberEATS to have new modes of delivering, new modes of service for their customers.

So they've weathered the storm far better than a lot of competitors. And you can ask is Starbucks really a technology company or are they a coffee company? And either way you look at it the technology is key strategically to how they operate going forward.

The third new reality is the new reality around work. The good news is we're not going to work from home forever. There's a new reality of hybrid work, something we're very focused on as we look at how the future unfolds. The future of work will be location independent, not work from home not always work in office but work designed to be location independent, time independent, asynchronous, data and metadata driven so we capture information in different ways, hyper automated to bring out the best in people and human-centric to really enhance the

human potential of the employees that we have. That really is the future of work that we'll talk about more as we go through things.

And the fourth new reality may surprise you a little bit, it's sustainability. Technology intertwined with sustainability is a key part of the new reality that we all need to incorporate in how we're operating and how we're guiding our businesses going forward. Think about one example: GM. Recently GM announced a partnership with Microsoft around cloud and other things. Microsoft invested two billion dollars in Cruise, the next week GM announced that they'll be all electric in their fleet by 2035. Technology and sustainability strategically with the business and that's why we say sustainability is the new digital going forward you know sustainability together with technology will drive the success and leadership for companies.

Okay so those are the four new realities. Take a look at these and I'll ask you to vote on which of these is most important to you or resonates most with you and your business. And we'll pick this a little bit up in some discussion later, so take a look and vote on these. Now we're going to move into the Vision.
and talk about why this context matters so much, so stay with me here and we'll walk through where the Vision's heading.

If you look to the past, we've gone through a whole sequence with our Vision starting with Every Business is a Digital Business in 2013 which I've talked about a little bit already. Debated at the time but it turned out to be really the guidepost to the future back in 2013. Then in 2016 people first talking about human potential, human ingenuity combined with technology and that's been a theme consistent in our Vision since then and again this year. The Post-Digital era foreshadowed the digital achievement gap that I just talked about a minute ago.

And the idea of the Tech-clash, we saw a lot of conflict coming between tech and people in society and we talked about this a lot in last year's Vision but we didn't quite anticipate all the

turmoil and change that was to come in 2020. But if you look at this then, you know what's the future now for 2021? Well let's go to the Vision then.

So here's the Vision. Leaders Wanted: Masters of Change at a Moment of Truth. It might take a while to digest this like Every Business is a Digital Business from years ago, but just reflect on this and think about what this means. We're talking about a moment of truth in a few ways. It's a moment of truth because we still have exponential technology change that we need to reflect in our business that's creating new opportunity. We'll talk about that.

We have these new realities that we just talked about that we need to incorporate in how we do business. And we've also got this once in a generation, once in an era opportunity to replatform our businesses. This replatforming of global business that's happening around the cloud and AI and everything else that's happening. Now is the time to get this right or you'll miss the opportunity to be successful, you'll miss the opportunity to optimize your investment, you'll miss the opportunity to be a leader.

That's why it's a moment of truth and along with that it's a moment of trust. Because trust is essential and intrinsic to everything that we're going to talk about in the Vision. And if you think back on the new realities that I talked about they're about trust with consumers, citizens, communities, stakeholders workers, employees, etc.

So let's dive in and take a deeper look. It says five key trends in the Vision to think about, five key trends that we'll walk through, that we believe are things to pay attention to as you chart your course. I'll walk through each one of them and give you a sense of what it's all about

The first one is called Stack Strategically: Architecting a Better Future. Now what does this mean? This means that how you do your technology is really important. It's not just about

the outcome—how you develop the technology, the architecture. The architects are strategic to your business which is why we're seeing c-suite and boards care about the technology and how it's done.

This is different from the way it used to be. And it's also a difference in how companies approach technology. One thing that is interesting is to look at how companies are charting that future. Moderna is one great example and that's relevant given what we're dealing with right now with vaccines and Covid.

So Moderna was one of the first to come up with a new vaccine. If you dig under the covers and look at how this happened, they had new science around messenger RNA and new approaches. But they also had a drug design studio, powered by the cloud with artificial intelligence, convolutional neural networks iterating on models, experiments, results, data, paired with scientists who could operate at unprecedented speed to produce a new vaccine quickly.

The technology coming together, the stack of the architecture, that matters to really chart that course to the future. So as you think about architecture in the future it's about things like the cloud. How do you get to the cloud and then how do you extend to the edge? It's about data in AI incorporated and supporting your business. It's about the experience layer to capitalize on the new reality that I talked about earlier. And it's about security to make sure you manage the risk. And that's what we mean by Stack Strategically and the role of this going forward.

The second trend is the Mirrored World: The Power of Massive, Intelligent, Digital Twins. Digital computerized twins that mirror the physical world. And we've talked about this in the Vision for a while. What's different is this is moving from simulation to operations and impact. The analysts forecast that spending on digital twins investment will increase from three billion dollars

this year to 35 billion, a ten-fold increase in just a few years. and that's you know what we see on the horizon as the twins expand to new elements of business and get networked together to drive greater impact on business.

The Port of Rotterdam is using digital twins and networks of them to really transform the shipping experience across multiple companies involved in shipping goods and supplies and the government agencies involved as well.
Or think about Unilever who's using digital twins in a manufacturing process
to save millions of dollars in energy costs, tied to the sustainability new reality that I talked about earlier.

Digital twins in retail, digital twins in sports, digital twins in automotive, in security with the cyber twin capability that we've developed and that's really charting a course to a different way of running the business and driving effectiveness in business going forward.

The third trend is called I, Technologist, which is the Democratization of Technology. If every business is a digital business then every person needs to know technology and needs to be fluent in technology. In our company we have a program called TQ technology quotient for every one of our 500,000 people to better understand technology and that's going to be important for every company as they drive this future going forward.

And it's about different ways of equipping people new tools, low code no code, to power up people. Things like Honeycomb from Amazon, Power Platform for Microsoft, Mendix, Pega, other platforms that can help people the average person, not the IT professional, develop applications in minutes rather than the old way of doing things. And the CIO's role will change to one of developing the applications to empower many more people and equipping many more people to power the business with technology.

The fourth trend is Anywhere, Everywhere: Bring Your Own Environment. And notice I didn't say

bring your own device, that's a part of this but it's much broader. Looking at how we power people to work in this new way and the role of technology in doing that. This is about creating the new culture of how people work in this environment. It's about securing in new ways, zero trust security as an example, to deal with the risks in this new environment we're working in.

It's also about new modes of working. Think about virtual reality like you see in the video that you're watching. Virtual reality used in scenarios like onboarding of employees the way we're using it at Accenture, or virtual reality and augmented reality for remote factory and plant inspections that a person can do for a plant on the other side of the world from their home or from an office. And that's creating a new future of the way work can happen anywhere everywhere and again with a very different environment and context around it.

And then the fifth trend is From Me to We, and this is about a multiparty systems path through chaos. Now what does that all mean? The future is about more complex ecosystems to solve these big problems we face. Think about carbon tracking, think about broad health and healthcare systems, think about supply chains, you know circular supply chains. This is going to involve
multiple parties working together and the time for multiparty systems, and by that we mean blockchain, distributed ledgers and the like, it's really here and it's required and we're seeing the impact of them.

Think about Singapore's digital health passport that has helped them manage the Covid crisis. The circular supply chain consortium that Accenture is a part of, working with many organizations to work with everything from the farmer you see on the screen to the end consumer to track something like a coffee bean from the point of origin to your coffee cup, and having transparency and trust and traceability all the way through the supply chain which has many benefits for all, from sustainability to more

equitably delivering some of the benefits of that entire value chain. So big changes powered by multiparty systems and new ways for organizations to collaborate going forward.

Okay we covered a lot. We went through five trends. Leaders Wanted: Masters of Change at a Moment of Truth. Just reflect on this, think about it a little bit more and think about these five trends. Okay one more thought to leave you with before we move on to another component of the meeting here. And just read the quote on the screen, this is a Chinese proverb that I really like and if you think about Masters of Change, read this quote and think about it.

When the winds of change blow some people build walls. Others build windmills. We have an exciting future ahead, it's a future of human empowerment and human potential. Working with technology in new ways, solving some of the big problems that are intrinsic in the world today. And that will be done by you know using the approach of windmills not walls, and thinking differently as we deal with the new realities. And hopefully the Technology Vision 2021 is providing you with a little bit of a thought starter and a guide so you can help navigate your way and build the windmills that you need in the future.

Okay so thanks for listening but we're not done so don't click the close button on your screen yet. Stay with us, you're going to see a question come up on the screen, I'd like you to vote for the top trend that you'd like us to discuss more in the next segment because we're going to have a panel discussion, we're going to get into this in more detail, because I just skimmed the surface of what's been a year of work by hundreds of people. We're going to get into some more detail, we'll talk about the trends that you guide us to with your votes and what you'll hear now is a little bit of music, a little bit of an interlude, so listen and reflect on what we talked about,

vote for your trend and we'll reconfigure ourselves digitally. We'll be back with you in a few seconds.
[Music]
[Applause]

Elise Corneille
Paul that was great, I have to say I think one of the most surprising takeaways from what you just shared and maybe for everyone here is pronouncement that technologists have moved from the groupies backstage at a rock concert to center stage, these rock stars of digital transformation, I didn't see that one coming.

Paul Daugherty:
No it was a lot of fun. It was the first time going through this is always really interesting and exciting so it's great to have gone through that, now I look forward to hearing what's on people's minds.

Elise Corneille:
Awesome well hey let me add my thanks to everyone for joining us here today for our 21st annual Tech Vision. We're going to get in deeply to the trends in this segment. My name is Elise Corneille, I lead Marketing and Communications for Accenture Technology. You've heard from Marc, you've heard from Paul, really pleased to bring in Annette Rippert, she's our group chief executive of Strategy and Consulting and she's here with us today to dive in.

And in addition to Marc's role, you know, as the lead of tech innovation he also supervises the research for our Tech Vision, and spoiler alert he always has a favorite trend that he's going to double down on. But let's get into the questions we have a lot streaming in so I'm going to try and get through them as quickly as possible and I'll keep monitoring as we go.

So Paul the first one is for you right, we talk about cloud, we talk about AI, we talk about 5g and even quantum in previous years, about how important they are to business, but why didn't they make it as a trend

this year? We have a lot of questions, why aren't they showing up as a trend in the Vision?

Paul Daugherty:
Yeah it's a great question and you know if you look back they weren't really
primary trends in prior years' Visions either. You know I track every single
forecast that comes out in trend reports, I've got hundreds of them stored away on my PC, I read these continuously and they all look the same you know what's important it's cloud, it's ai, it's data etc. etc. And frankly I don't think that adds a lot of value to just report out the same list and the same set of trends. So what we're trying to do is get beyond the trends to what you
need to do about it and that's what we've always tried to do in the Vision and why it sounds a little bit different.

So cloud is a key element throughout the trends, you'll see a lot of artificial intelligence, data, virtual reality—you'll see all the same technologies there but presented in a context that I hope allows everyone to contextualize it more and make better decisions about what you really do with your business.

Elise Corneille:
That's awesome. Okay another question and I'm going to give this one to you please. So Stack Strategically, as you know the feedback we're getting is it's a really interesting trend and I've got a question around that. So, we said that how you develop your technology architecture matters more than ever to business but can you expand on why and then maybe give an example of
of best in class because a lot of people are dealing with more brittle architectures now. And who's doing that really well and you know what are kind of some steps today?

Annette Rippert:
You know I think it's really clear about the challenges that our clients have been facing that's going across every industry. When we think about like
what is that really in a practical sense? We see

the need to adapt business models, think of retail having to move to contactless delivery. I mean Paul you
gave an example of what's going on with Starbucks, or think about how changes have had to be made across distribution, logistics and supply chain.
All of this is also impacted by the fact that the teams that support these organizations are working differently right? They're working from home as you
were just talking about, so I think one of the things when we think about best in class, our Tech Vision survey surveyed more than 6200 business and IT executives. And it revealed a couple of really interesting statistics.

So when we think about this, 92% of the executives that were surveyed,
perhaps you would see this coming, said that their organization is innovating with an urgency and a call to action like never before. So when we think about good examples of what does that mean, when we think about stacking strategically, I think of an example about the UK Department for Work and
Pension. So when the pandemic first hit they had already prepared by building a series of microservices and the creation of an API library. And so during the pandemic when all of this need for services started
surging, they were able to completely shift gears and identify and quickly scale up critical services. So like think about what that is—in record time they were able to create automated systems for uploading medical records, for getting universal benefit checks situated, for issuing free school meal vouchers for people. I mean these are real services that needed to be turned up and we've all heard the circumstances where that didn't work effectively. And this is an example of someone leading and they were leading in a way that instead of being reactive, their preparation allowed them really to generate what I would consider technical wealth.

And if I think of another example, a great example would be how companies are using the benefits of stacking strategically to accelerate

things like product development. So one example would be around AB InBev and Keurig Dr. Pepper who are working together on a product called Drinkworks. So it's a collaborative venture between them and just in 18 months they launched this new product that's a first of its kind and it's designed to prepare bar quality cocktails, you know brews and ciders and it allows them to really put up a new bar quality beverage that can be served in a way with minimum cleanup.

And all of that, generating entirely new revenue streams for their businesses.
All because they had prepared and better positioned their businesses, really to be positioned to reinvent products. And so, you know I'm sure that it's no
surprise to you, so when we think about some of the other statistics that we heard from that survey, 83% of the executives agree that their organization's business and technology strategies are becoming inseparable, even indistinguishable from one another. And so these are just a couple of examples of why I think now it's becoming so important to stack strategically.

Elise Corneille:
And this from our poll turned out to be the top trend that people wanted to hear about so I'm going to ask a couple follow-on questions that are coming in. You know one of the questions that's been asked is, you know a lot of people are dealing with a huge amount of legacy IT—realistically how quickly can people replace these?

Annette Rippert:
Well when we look also at the ability to use new technology, I'll use another example that I think is a top one, which is about Royal Dutch Shell and they have a goal to become net zero emissions by 2050. So this is a key sustainability goal. And they have a program called Charge Works, which is really working on developing and deploying edge intelligence algorithms to optimize energy consumption at the electric vehicle charging stations. So we think about time

to implement, you know, they leverage the ecosystem to accelerate their time to implement. So this is a joint effort together with Microsoft and it aims to develop these AI solutions to support their goals, which would never have been possible before without investments in quantum computing research. And if we think about broadly their ability to be able to support this, it's accelerated because there's teaming, it's because the technology has moved quickly.

And so now like never before, when we think about preparing by stacking strategically, these kinds of initiatives can be brought to market much more quickly.

Paul Daugherty:
Yeah I'm pleased that that one actually was number one, there's a reason we
put it number one first in the list so it's good to see that's what the audience
thought as well. The other thing I'd say on legacy is it's a real challenge for
organizations, and we talk about you know the technology debt that companies have. I think that what we're saying in the Vision this year is how do you look at these techniques? And how do you create technology wealth?
Because this is about how you position technology to be the change agent, to master change as we say in the Vision title. And using some of these techniques to create technology wealth to prepare better for the future, is just I think one of the things we need to focus on.

Elise Corneille:
That's awesome. A comment for you Paul, someone says I agree with
you Paul, it's boring to hear the list of all the technologies each year so
kudos to you for doing it a little differently. And Marc I'm going to turn to you, we've got a few questions here on sustainability and two parts here. First, we're coming out of a pandemic, we've got legacy IT on one hand that Paul mentioned and Annette talked about, we've got huge workforce challenges
which I want to get into in a minute, realistically

can businesses tackle sustainability right now? And then the second part of that corollary, what should technology leaders do? What is their role? As Paul talked about rock stars earlier, are they rock stars of sustainability? What's your take?

Marc Carrel-Billiard:
Yeah I love the questions, I mean Elise and if you think about it and we've seen companies doing that, I think if you look at all the trends that we have, one of my favorite ones is probably number two, when we talk about mirror world, all this technology about digital twin. And we're talking about like how we're going to digitize your world. Being able to digitize your world, it's something that you're going to help basically people, I mean eventually work remotely. And I think that this is the first thing that we can do, I mean the fact that being we've been all under lockdown, we cannot travel anymore, we need still to go back to the office, how are we going to do that?

The fact that we can digitize basically your office, you can digitize your plants, you can digitize your manufacturing environment and everything. It's going to help you basically to get them back to work in some immersive environment
and you'll still be able basically to act on the machines and everything. This is typical things that we're going to see. So that's going to reduce obviously carbon footprints. What we also believe, we did a survey that's very interesting when Paul was talking about how basically there's a digital gap you know it's five times between the laggers and the leaders, what we know
also is that if you combine sustainability and technology then the likelihood that you're going to be a leader in inventing the new future is going to be there.

And I think this is something that we are considering very seriously and we're not the only one by the way. If you look at Unilever for example, they have started to digitize their factory and so what it means is that they've built

basically a digital twin of their machines, they collect data through IoT sensors and with that they can do predictive monitoring, they can have a control center where they can control their machine. I mean this is also a future view, a vision that we have in our lab. So you know what we're doing and I know that Paul is pretty excited about this, is that what we're building is a digital twin of machines, real machines and then eventually tomorrow a worker will use basically this headset, VR headset, something that you see behind basically on my on my bookshelf, they will wear them and they will be immersed into a world where they will be sitting in front of the digital twin. And I'm talking about like a virtual world, which is not about visualization only, it's haptic feedback it's all haptic sensing's and everything and you get all these senses back to him, he will be able to act on a machine like it would be the real machine but guess what? That machine will be connected to the real machine using edge IoT, using exactly what Annette talked about, that stack that we have to put strategically. So you see all these things are very combined together.

Elise Corneille:
That's awesome Marc and we have so many great questions coming in so I'm going to try and collapse a few. Someone commented great job bringing up the leadership early in this conversation and leaders are looking for business and technology things to rally against, I think that is a very important point and I'm going to use that to bridge to you Annette, lots of questions here about culture right. And I'm going to read a few and just kind of get your broad sense about you know what are we looking at for the future of work and what are those implications? So one person said I'm keen to hear from you on Anywhere, Everywhere in this post-Covid world, how do you anticipate the operational teams to work remotely for field engineers? Then also someone else said culture is going to be big. How do you create a culture when we're no longer face-to-face, shoulder-to-shoulder? So what should leaders be thinking about, business and tech leaders Annette?

Annette Rippert:
Yeah you know this is really a very good question and I think one that we're going to work with for some time because what's really kind of fundamentally at play is the way we work completely changed. And I think there in my conversations with clients there are a couple of key things that are coming up that are fundamental. We may not, as many technologists on this meeting here, we may not always be thinking about some of the softer sides of this but this includes a sense of belonging. You know when you're working together on a team there's a sense of a shared experience. You know the common caring for the outcome of what you're working on but also the well-being of the people that you're working with.

And so distance changes those things, it changes them in many ways and that includes concerns around mental health when we're all on all the time, you know that becomes a big piece. And so this is something that we've been working on and so I think putting that idea of the future of the work, front and center, really looking at a new mindset of the employee experience and thinking about here what role does technology play? Individuals' technology plays a big role in how we create that connection. Today we're connecting with all of you in a way that symbolizes the way that we did connect before but in a different way.

And so technology allows us to create an environment that helps you stimulate, you feel like it did when we were all together yet in a different environment. So we all have moved to a place where we look to retain that connection with employees through virtualization of a work environment, Marc talked about digital twins so that we can start to think about how do we service environments remotely and yet in a safe way connected to a real environment?

And so I think that this is going to really be the next step in every company's future on this work journey. So if I think about it, I'm going to give

maybe one example at least to make that come alive and I'll take, I know I used a similar example but I'll take NHS Digital. And if we think about that, that's the IT provider supporting the health systems in England. And you know at the onset of the pandemic, together with Microsoft and Accenture, we helped to put in place Microsoft Teams for 1.2 million of their staff. But what did this
really do? And when we start to see simulation of the environment
this allowed them to do virtual appointments, it allowed them to have town halls like an event like this, to keep people feeling connected, it allowed them to communicate with people in isolation rooms so that they could collaborate and yet maintain aspects of safety.

And so when we think about the complexities of today's environment and
changing environment, by the way, right? Because we see companies who will begin to go back in hybrid modes, ways of working, so you know maintaining both. The idea of virtual environments sustained alongside a return to work environment will become increasingly important. So you know as we think about that I think it's very important that we think about the cultural aspects of this. Accenture for example we onboard a lot of people into our organization. How do you make a new employee feel a part of a new culture and organization when in many cases you've only met them and worked with them in a virtual way? That's a very new challenge for all of
us to face.

Paul Daugherty:
I think that's great and the thing I'd add is the way I think about this
is we have an account balance of social relationships that we have with
others, and that account balance was at a certain level for each of us individually, our social relationships our account balance is at a certain
level pre-Covid and what happens since we're all working virtually is that
balance gets depleted because it's harder to

maintain those connections which is why we have to work harder as you were just saying to do that. The social bandwidth of building connections is far greater when people are together in person than when they're connected with technology. So it's your bank account, our bank accounts are up here they're being depleted in this way we're working through Covid and you have to work a lot harder to invest and build that balance back up. And that's why the return to work is going to be so important and there will be a new normal that's not everybody working remotely because humans want to be together, there's a powerful bandwidth of social connection when we get people together, and that hybrid environment of returning to work that we talk about in the Vision I think is really important for all of us to think about. Because that social connectivity and building culture and things, we can do a lot of that virtually but we always need the bandwidth of the real human-to-human connection.

Elise Corneille:
Yeah you know I agree I'm going to try and follow up with you with a question from one of our people in the audience here. It said the pandemic pushed companies cultures to change so quickly, except the remote work we talked about, be more agile, do you think we will go back to old behaviors once the pandemic is over and what can we do to make the changes durable and sustainable? So two parts, you know will we go back, how can we keep those changes durable and sustainable? And I'd like to bridge the other point—we've polled folks and they've said human experience was the one thing in the new reality that most resonated with you, so I think those two things are intertwined, can I get you to comment on that?

Paul Daugherty:
Yeah that was to me just, I think the bridging is really important, I think the way we think about the future of work and we put all this together is going to be really important, which is why we really highlight that so much in the Vision. It's about, how do we interact in different ways, how do we use different technologies to connect? We talk a lot about virtual reality and things like that, and that's examples of onboarding that we're doing in Accenture. We're using new technologies to do that kind of work and I think creating those experiences is important. I think this idea of experience and human experience is really profound because the human experience has changed so dramatically due to Covid. But we don't, I don't think any of us fully understand the changes that have happened in human experience because of Covid and we'll be looking at that for a long time to come.

And that this idea of business of experience that some of our teams at Accenture are working on becomes really important. When you think about the Stack Strategically, the experience layer of how you create that within organizations becomes important. Anywhere, Everywhere of how you work in this new environment becomes really important. And the other thing that's really important that I think we probably want to tie in here, and I think need to tie in here is this idea of trust and the trust becomes really important as we think about this as well. How do you create trust in your workforce? How do you create trust amongst your consumers? How do you create trust in the communities you work in as you evolve on this strategy? And that's why you need to take the next step, what becomes really important is back to the sustainability point and an element of sustainability around thinking about inclusion and an inclusive and diverse approach to how you construct your workforce and how you think about the world going forward.

If the future truly is here and we're trying to catch up you need an inclusive workforce to get you there. Because if we're building a future we better have a group building that future that is representative of the people that are embracing, embodying and living in that future, which is why inclusion, diversity and thinking about equality and how you move to this future world is critical. Maybe it's a good time to bring in Kathy to talk a little bit about what we're doing in that area because it's intrinsically tied into the Vision.

I think it's really important to think about so Kathy maybe you can kind of share some of your thoughts on this topic for us that you've been working on.

Kathryn Ross:
Yeah absolutely thanks Paul, you know just listening to everyone, at the heart of everything whether it's the future of work is that human experience and Annette said it—culture, shared experience, we need to, and technology is driving this new reality and if that technology doesn't take into account right, the diversity of voices or the diversity of experience to really shape this technology of the future, then we potentially introduce some of the biases that we had in the past.

This is our opportunity to truly double down on our commitment to gender parity by 2025, strengthening our relationship with organizations like Girls Who Code to make sure that pipeline of women going into technology careers continues to grow. To continue to invest in initiatives like Project Elevate, that really focuses on the retention and recruitment of minority talent. And then externally continuing to shine a spotlight on black entrepreneurs through our Black Founders Development program. And as I said we need these voices to shape the future of technology and the technology of the future so that when we talk about the future, whether it's of work or otherwise, it's truly inclusive. And we not only bring that diversity to innovation but also really look to address the biases of the past as well as not introduce that in the future. Back to you Paul.

Elise Corneille:
I think that's really powerful; the future is inclusion. We're going to need to wrap up and head to our next segment, lots of great questions I wish we could have gotten to them all but thank you all for being here. Hang on, Paul is going to take you into the next segment. You'll hear short musical interlude and we have two fantastic leaders that Paul is going to speak with in the next segment so thanks for joining us and we hope you enjoy our Tech Vision 2021. Paul back

over to you.
[Music]
[Applause]

Paul Daugherty:
Okay let's move into another segment here of our discussion on the Vision and I'm so excited to be joined by Yvonne Wassenaar and Filippo Catalano here to talk about the Vision and share some other perspectives. So we'll have a little dialogue here and I'll just give a quick intro real briefly, Yvonne is the CEO of Puppet, a company that many of you probably know very well,
formerly the CEO of Airware, which was a drone company, CIO of New Relic and a lot of other great experience in technology and related industries.

And Filippo is the former global group CIO of Nestlé and will be incoming CIO and also responsible for digitalization at Reckitt Benckiser. So really pleased to have the two of you here Yvonne and Filippo and hear your perspectives on the Vision. And Yvonne maybe I'll start with you just to give your perspective. You've listened to the Vision, you've heard some of the dialogue around it, you've got a really interesting perspective coming out of the tech industry like you do. What are your takeaways and can you share some of your reflections?

Yvonne Wassenaar:
Yeah absolutely Paul, thanks for having me here, excellent dialogue. And all the trends I think make a lot of sense to me, the one that resonates the most, it sounds like it's the same for the folks here is Stack Strategically, which to me is very closely intertwined with I, Technologist. Stack Strategically is really calling on all of us to push the boundaries and our limiting beliefs of the past
and the pandemic has certainly done that. But to me, what really jumps out is it's critical we don't become blinded by the shiny new toys and come crashing down to the ground. And I think for as much as this time has been a revolution in how we've had to run our businesses and think about what needs to be done and how we can do

things differently, and all these exciting new technologies and capabilities—large organizations just can't throw away everything and you can't fire all your employees, even if you wanted to and you, don't.

So many of us spend so much time on culture and enrichment and so the opportunity I think is really going to be figuring out where can you place technology bets, who can you partner with both from a technology and a people side to, in many regards, meet you where you are and take you where you need to be. And for example, not every employee needs to know how to build new applications in Kubernetes, but if we're going to do more in cloud native architectures and in the cloud and take advantage of these things, where can you find ways to abstract away to higher level platforms? How can you think about things like low code no code and this is where it blends with I, Technologist. Can you introduce DevSecOps concepts and processes to some of your folks who might be working on mainframes? And I've had the opportunity to see companies successfully do this and I think this approach of taking a revolution outside impact with an evolutionary approach inside is important. And the last thing that I'd say on this is I feel we're a bit in what I would call the creation economy where everything's focused on getting net new stuff out into the wild. And I just really put a word of caution that scalability, security, compliance are going to be important, more important than ever. We've seen this with the Zoom and the Google and the Slack outages, with the SolarWinds breach. Don't get so enticed by these new applications and ways of doing business that you forget the basics. But super exciting.

Paul Daugherty:
That's a great comment, so the creation economy is really a great term actually and this idea of meeting people where they are and people in tech but maybe we'll come back to that in a minute but great thoughts. Filippo you know we've had a lot of conversations on innovation, I've always thought of you as one of the people in the industry really thinking ahead and thinking

about how you move the company ahead. What are your thoughts on the Vision and the messages? What resonated and what's your view on how this all unfolds?

Filippo Catalano:
First of all thanks for having me today. I think the one, I think they're all quite spot on and very relevant. I think the I, Technologist, I'm quite passionate about that because I think this is the democratization of technology, the concept of citizen developers, citizen analysts, citizen innovators within the enterprise is something that is ramping up really, really strongly. And this is a big challenge also for us as technology leaders in the enterprise.

And I think the role in for us in this space is going to be really about how do we provide the right frameworks, the right modular capabilities that are safe, that are compliant, that are cyber resilient, they are trustable, they can address the right data layer in the enterprise, but also finding a way to get out of the picture in a way if you're not adding incremental value and I think culturally, you know we talked a lot about the people component in the trends, I think culturally this will be one of the things we need all to watch out in our own teams. How do you also know when to move out of the process? Because with the democratization of technology, people can do a lot of things on their own in the right frameworks.

Paul Daugherty:
That's a great perspective and maybe a question right back to you Filippo then I'd like Yvonne's comment on this too is, with this democratization of technology which really kind of impacts all the trends if you think about it not just the I, Technologist, one of the things that you know, I was just talking on a call with a group of executives, technology CIOs and technology executives this morning and we're talking about this idea of data culture and things like that, which gets into not just the technologists, you know empowering technologists but as you said a little bit of your response there it's the analyst, it's the business becoming equipped to drive this

technology. Maybe talk a little bit about how do you create that culture? Not just in technology but the CIO's role and the technology's role in creating that across the entire company?

Filippo Catalano:
Yeah and I think I would start from the foundations; we should always go back to the foundations of our work which indeed connects to the concept of how you build the technology stack to allow so? And for me one of the foundations is really to use a data implemented strategy which is going to be FAIR, FAIR is an acronym. So it's going to be findable, it's going to be addressable, it's going to be interoperable within the enterprise and it's going to be also reusable. I think this is a cultural aspect that needs to advance further in multifunctioning in the enterprise as a way to break down some of the silos, some of the collaboration styles, and I think we have this unique opportunity, this inflection point in the technology history, where we can actually get that happening at a pace that was unthinkable before.

Paul Daugherty:
Yeah Yvonne you were talking about something similar I think when you talked about meeting people where they are. Why don't you pick up on that?

Yvonne Wassenaar:
Yeah I'm a huge believer in a lot of what we've learned around the concepts of agile and DevOps and now DevSecOps, and the opportunity to expand that across the enterprise in their core principles. And what I mean by that is I think what has happened over the last many decades if not centuries is this buildup of there's marketing and there's sales and there's the IT organization and the finance organization, and that's not how the world is going to work effectively going forward. We have to be focused on business outcomes for customers on small sprints that have engaged in agile iterative cycles that allow us to bring the best of a company to bear in the interest of driving great customer experience and outcome. And so to

me what I think is really important and one of the fundamentals of the initial concept of DevOps was breaking down the silos and really thinking about how do you come together in an iterative fashion to drive impact? And when we talk about technology going from the back office to being the business, and I agree with you Paul every company is a technology company, every person in some regards needs to benefit from technologists but they may not be a software engineer nor do they need to be—they need to have access to the power of that and I think to what Filippo said they need to have access to the data. So bringing together powerful teams to drive that impact I think is going to be the best path forward.

Paul Daugherty:
Well maybe just to follow up to that Yvonne to you and then get Filippo's view, you mentioned social consciousness earlier which you were just kind of getting close to with that comment, you know if you think about this future we're talking about, which I think it's an exciting future of human potential and human empowerment in terms of if we do this right, which I think is within our grasp to do, and what we're trying to point out with the Vision. But not everybody has equal access to technology, not everybody in our organization is equally equipped, maybe your thoughts on what you meant by social consciousness and how that ties in, and Filippo would love to get your your view on that too?

Yvonne Wassenaar:
Yeah, I want to start with why social consciousness matters in tech and I think it's because at the end of the day with AI technologies, with technology running all of our lives, we have to understand what the impact is on society around us. we have to think about those things and have a higher degree of social consciousness in the decision-making tables. Not just in what we build but on the impact it has in society. Who do we need to retrain and retool and so forth? In terms of democratizing technology, I think open source is an incredible way to do that, I think some of these low code no code opportunities is a great way to do that, I

think your comments about you know Anywhere, Everywhere in terms of people, just provide so much more access for different folks from diverse backgrounds to participate in interesting ways. So I think there's many different trends that are going to help and if we all maintain in our positions of powers of focus on driving that change, I think the other elements are coming together to make it really possible.

Paul Daugherty:
Great and Filippo we've called this segment the final word and you get the
final word, your thoughts on it?

Filippo Catalano:
Maybe you know two comments on my side on the topic, I think the first one is around the fact, and we touched on it earlier, is that there is also this incredible window of opportunity for the enterprise technology to contribute at
the broader, to have a much bigger impact on things that are really about society and sustainability. And there is no sustainability roadmap achievements without a proper technology roadmap to help out. So i think it's a tall order for all of us also to step up on this topic.

And the other topic that is very close to me is I like the concept of tech wealth so that we can finally move out of the red. But also we need to be, I think, very cognizant from a leadership perspective that to empower everybody to do what we need to do in this new reality, we need also to put all the possible
ethical principles on the forefront. Technology debt is okay but we cannot have ethical debt in the way we bring technology to the company, so

something you can you know pay back later. So I think my perspective is that as technology leaders we all need to take a strong position on the ethics that come with data, machine learning and AI.

Paul Daugherty:
Super final comment there Filippo, so thank you and thanks Yvonne and Filippo to both of you for tuning in and participating and sharing your views. We could go on for a long time with this but I think that was a great focused set of views on the Vision and what really matters. So thanks so much and with that we'll turn it back to Marc. So take us home Marc.

Marc Carrel-Billiard:
Well that's it for our launch event. I hope you liked it as I did and you learned a few things along the way as I did myself. Well thanks again for the questions, I think they were very, very good and you'll be able to download the technology vision report at www.accenture.com/technologyvision.

Let's continue the discussion, you can post on social media using #techvision2021. I'd like to take the opportunity to thank our friends from TouchCast who put this virtual event together and thanks again from wherever you are for connecting on this launch event. I know you have all a very busy agenda so we really appreciate you for attending this event. Thank you and stay safe.