The Digital Index is an annual outside-in assessment of the digital transformation maturity of 100 top companies in Switzerland. Our report combines insights and actionable recommendations for accelerating digital value creation in Switzerland.
This year’s report shows that the **MAJORITY** of Swiss companies enhanced their innovation processes and, as a result, their monetization of digital products and services. This has driven **PROGRESSION** toward a **HIGHER DIGITAL INDEX** and respective segmentation. The DNA of digitally mature companies is now visible **ACROSS ALL INDUSTRIES**.

Key influencing factors include a high commitment by companies’ **LEADERSHIP** and **ORGANIZATIONAL ALIGNMENT** with a strong focus on digitization of products and services.
MAJOR ELEMENTS OF DNA INFLUENCING COMPANIES’ DIGITAL MATURITY

LEADERSHIP INVOLVEMENT
High leadership involvement in promoting the digital agenda

ORGANIZATIONAL ALIGNMENT
Organizational restructuring and streamlining of internal operations

CUSTOMER EXPERIENCE
Fusing the analog and the digital worlds into one, seamless experience

DIGITAL VALUATION
Digital services become the essence of the product with a unique value proposition for the customer
MEASURING DIGITAL MATURETY.

THE DIGITAL INDEX

MADE IN SWITZERLAND
MEASURING DIGITAL MATURITY: THE DIGITAL INDEX

OUR STANDARDIZED AND INDUSTRY-TAILORED RESEARCH APPROACH ENSURES COMPARABILITY

We rated each company against its industry peers according to four dimensions indicating its digital maturity. Industry-level ratings are standardized to take account of analytical bias.

The data was aggregated to run through our advanced analytics algorithms. We distilled three maturity segments and four DNA profiles with regard to digital trends, orientation and journey.

We complemented these insights with tailored recommendations based on best practice and on Accenture's expertise and experience in digital transformation.

We selected a sample of 100 Swiss companies across industries, and gathered publicly available information on 130+ industry benchmarks with the support of Watson.
MEASURING DIGITAL MATURITY: THE DIGITAL INDEX

OUR SCORING METHODOLOGY REFLECTS A BALANCED ASSESSMENT OF DIGITAL MATURITY

DIGITAL INDEX

PLAN
Strategy and actions that companies are defining to respond to technology-driven changes in consumer behavior and the competitive landscape

MAKE
Design and creation of digital product and service portfolios to meet today’s consumer demands and create new revenue potential

SELL
Use of digital channels to sell, market and personalize products and services, as well as enabling continuous engagement with customers

MANAGE
Digitization of internal processes, use of data insights and adaptation of structures, as well as procedures, to improve operational efficiency

SEE
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PLAN
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ACT
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DESIGN
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BUILD
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RUN
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ENGAGE
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SELL
Ø

SERVE
Ø

ASSESS
Ø

IMPROVE
Ø

RENEW
Ø

DIGITAL ANALYTICAL RECORD
A total 42 business activities are scored according to their range of digitization 1-4: 4 = significantly above, 3 = above average, 2 = below average, 1 = significantly below.
The unweighted average of components and their dimensions are derived from these scored business activities in the digital analytical record.
VALUABLE INSIGHTS GENERATED THROUGH OUR ADVANCED ANALYTICS ALGORITHMS

Use advanced analytics algorithms to derive features

Use advanced analytics algorithms to aggregate maturity segments

Raw data aggregated to create features that are representative of digitization behavior and can capture that behavior across companies

Companies grouped by features reflecting the trend and digitization journey
MEASURING DIGITAL MATURITY: THE DIGITAL INDEX

BASED ON THE FOUR DIMENSIONS, MATURITY SEGMENTS AND DNA PROFILES CAN BE DERIVED.

DIGITAL INDEX

PLAN

MAKE

SELL

MANAGE

DIGITAL MATURITY SEGMENTS

- Digital Followers
- Digital Maintainers
- Digital Trendsetters

DIGITAL DNA PROFILES

- Leadership Involvement
- Organizational Alignment
- Customer Experience
- Digital Valuation

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For the very first time, the Digital Index Switzerland team conducted a study by automatically crawling and analyzing millions of data sources from the internet. This formed the basis of the initial Digital Index proposal. The team designed a unique model for automating industry research that leverages natural language processing, semantic web crawling and machine learning capabilities with Watson. Unstructured data was analyzed using natural language processing to understand grammar and context. Watson enables complex questions to be answered by evaluating all the possible meanings of each question.

Our findings and recommendations are based on the supporting evidence and the quality of information. By applying powerful new technology with a cognitive system and artificial intelligence, the Digital Index team disrupted and digitally transformed the way research studies were done in the past.

In traditional research studies, humans carry out time-consuming literature- and internet-based research and apply biased, subjective reasoning. By deploying standardized, technology-backed analysis, the Digital Index team was able to reduce time for manual research activity by more than 2/3, while at the same time improving the objectivity of results. Thanks to Watson’s self-learning algorithm, the research methodology is now set up for reuse at scale in other industries, countries or even completely new topics.
The deep collaboration between Accenture and Watson was one of the main reasons for this project’s success. As well as leaving an unprecedented footprint in the field of artificial intelligence, the project proves Accenture’s capability to successfully apply innovative technologies (artificial intelligence, machine learning) across industries.

**WATSON IN NUMBERS**

3k  
>1mn  
>230  
$\frac{2}{3}$

- Keywords used in the process
- Websites crawled by Watson
- GB data analyzed
- Time saved in research by working with Watson
DIGITAL INDEX SWITZERLAND 2017
REVEALING THE DIGITAL MATURITY OF SWISS COMPANIES
IN OUR NEW REPORT, WE IDENTIFY THREE DIGITAL PROFILES FOR SWISS COMPANIES

**DIGITAL FOLLOWERS**
Companies that have initiated their digital journey, but still lack the readiness to fully transform.

**DIGITAL MAINTAINERS**
Companies focusing on digital asset monetization, but lacking a continuous innovation pipeline.

**DIGITAL TRENDSETTERS**
Companies focusing on digital-led innovation with a strong focus on planning, but lagging in digital sales. Today’s trendsetters have been Growth Champions in the past.*

INFLUENCE DIGITAL MATURITY THROUGH A BETTER UNDERSTANDING OF THE MECHANISM

DIGITAL INNOVATION

Digital innovation indicates companies’ ability to develop continuously innovative solutions for their customers. This is characterized by the adoption of new technologies and a customer-centric service design philosophy (such as Design Thinking).

DIGITAL ASSET MONETIZATION

Digital asset monetization indicates companies’ efficiency and determination in monetizing digital products and services. This is characterized by mastery in conveying the added value of digitization for their customers.
TYPICAL CHARACTERISTICS: DIGITAL FOLLOWERS
- Promotes existing products into digital products and services through digital platforms
- Focuses on testing the market before overarching digitization
- Does not consider end-to-end digitization and integration

TYPICAL CHARACTERISTICS: DIGITAL MAINTAINERS
- Has a small range of fully digitized products and works on digitizing even more products
- Customer access channels are not channel-specific and focus on digital preferences
- Needs to facilitate innovation with a dedicated factory or investments

TYPICAL CHARACTERISTICS: DIGITAL TRENDSETTERS
- Transforms its organizational structure and technology landscape to fit digital needs
- Has a dedicated innovation capability to develop new trends, products and services
- Has overarching digital marketing activities, but needs to focus on sales and monetization

EACH PROFILE DISPLAYS DIFFERENT CHARACTERISTICS

Digital Index

1.8

Digital Index

2.2

Digital Index

2.7

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DESCRIPTION OF FOLLOWERS’ PROFILE

BUSINESS ACTIVITIES THAT DISTINGUISH FOLLOWERS

Digital Asset Monetization
- Starts launching digital products and services to the market
- Offers customer services that are not directly related to sales through digital means
- Streamlines internal activities across functions with the aid of digital

Digital Innovation
- Works to improve operational efficiency by equipping employees with digital skills & tools
- Assesses status of digital /IT infrastructure and capabilities
- Sees digital as a key part of its internal corporate strategy (digitization)

AVERAGE SCORES

DNA characteristics
- Leadership Involvement: 1.8
- Organizational Alignment: 1.7
- Customer Experience: 1.8
- Digital Valuation: 1.9

Followers segment
- Followers: 34%
- Maintainers: 19%
- Trendsetters: 47%

INDUSTRY PROFILE
- Chemicals & Natural Resources: 33% (2)
- Communications, Media & Technology: 43% (3)
- Construction: 33% (1)
- Consumer Goods & Services: 29% (4)
- Financial Services: 35% (8)
- Manufacturing: 28% (5)
- Pharmaceuticals & Healthcare: 40% (2)
- Retail: 33% (2)
- Travel & Transportation Services: 50% (4)
- Utilities: 33% (1)
- Consumer Goods & Services: 33% (1)
- Retail: 43% (3)

SAMPLE COMPANIES
- Axpo Holding
- Charles Vögele Mode
- Huber + Suhner

KEY RECOMMENDATION: IGNITE INNOVATION AND STIMULATE DIGITAL SALES
DESCRIPTION OF MAINTAINERS’ PROFILE

MAINTAINERS SEGMENT

Digital Asset Monetization
- Assists customers with their purchases through digital capabilities
- Provides resources to start-ups that have a focus on digital initiatives
- Engages in two-way communications with customers through digital capabilities

Digital Innovation
- Has dedicated leadership for digital initiatives
- Works to enhance digital capabilities through collaboration
- Sees digital as a key part of its growth strategy (digitalization)

BUSINESS ACTIVITIES THAT DISTINGUISH MAINTAINERS

AVERAGE SCORES

DISTRIBUTION

INDUSTRY PROFILE

SAMPLE COMPANIES

- Alpiq Holding
- APG/SAG
- Galenica

KEY RECOMMENDATION: INVEST IN A CONTINUOUS DIGITAL INNOVATION PIPELINE
DESCRIPTION OF TRENDSETTERS’ PROFILE

TRENDSETTERS SEGMENT

BUSINESS ACTIVITIES THAT DISTINGUISH TRENDSETTERS

Digital Asset Monetization
- Works to integrate physical presence with the digital shopping/purchase experience
- Offers integrated paying experience with the aid of digital technology
- Delivers product/customer service through digital capabilities

Digital Innovation
- Leadership is active in presenting/promoting the company’s digital agenda
- Gathers insight into consumer preferences using digital technologies
- Identifies corporate cultural fit with digital agenda

AVERAGE SCORES

<table>
<thead>
<tr>
<th>DNA Characteristics</th>
<th>Digital Index Ø score</th>
<th>Leadership Involvement</th>
<th>Organizational Alignment</th>
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DISTRIBUTION

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<th>Followers</th>
<th>Maintainers</th>
<th>Trendsetters</th>
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<tr>
<td>31%</td>
<td>43%</td>
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INDUSTRY PROFILE

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<tr>
<td>Communications, Media &amp; Technology</td>
<td>43%</td>
<td>(3)</td>
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<tr>
<td>Construction</td>
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<tr>
<td>Consumer Goods &amp; Services</td>
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<tr>
<td>Manufacturing</td>
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<td>Pharmaceuticals &amp; Healthcare</td>
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<tr>
<td>Retail</td>
<td>33%</td>
<td>(2)</td>
</tr>
<tr>
<td>Travel &amp; Transportation Services</td>
<td>25%</td>
<td>(2)</td>
</tr>
<tr>
<td>Utilities</td>
<td>30%</td>
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</table>

SAMPLE COMPANIES

- Syngenta
- Swiss Life
- UBS

KEY RECOMMENDATION: BRING INNOVATION FROM THE LAB TO THE MARKET
INDUSTRY COMPARISON BY SEGMENT
The majority of the 2016 Followers progressed toward Maintainers. They have started to sell their standard products and services through digital capabilities.

Nearly half of the 2016 Followers have retained their profile throughout all industries. This indicates that overall digitization still has major potential to evolve.

Close to half of the 2016 Trendsetter companies were demoted to Maintainers. They have failed to keep their innovation level and were overtaken by their peers.
DON’T FOLLOW DIGITAL TRENDS
START THEM
DON'T FOLLOW DIGITAL TRENDS. START THEM

MORE ACCENTURE RECOMMENDATIONS AND STUDIES FOR ENHANCING DIGITIZATION

DIGITAL INNOVATION

- Involve leadership for promoting the company's digital agenda
- Enable cultural change toward a fit with the digital agenda
- Restructure the organization to reflect and adapt to digital trends
- Create the right environment for driving digital innovation
- Get insights into consumer preferences using digital technologies
- Invest in simple and smart interactions like artificial intelligence as the new user interface for customers
- Build a new and robust ecosystem beyond platforms
- Be courageous: invent new industries and set new standards

RECOMMENDED ACCENTURE STUDY: DIGITAL TRANSFORMATION IN THE AGE OF THE CUSTOMER

- Define a clear vision and define the technologies around it in order to support and realize that vision
- Become willing to take risks and learn from mistakes
- Streamline internal operations through outsourcing of non-core functions
- Find partners whose capabilities complement your own
- Deliver products and customer services through digital channels
- Enrich your physical presence with digital experiences
- Use digital channels for marketing and advertisements

RECOMMENDED ACCENTURE STUDY: TECHNOLOGY VISION SWITZERLAND 2017

DIGITAL ASSET MONETIZATION
CONTINUOUS DIGITAL ADVANCEMENTS ENABLE NEW WAYS TO INNOVATE AND BECOME DIGITALLY MATURE

**Experience Above All**
Simple and smart interactions create value at each touchpoint, resulting in AI coming of age to become the new user interface of every digital business brand.

**Beyond Platforms**
Platform companies completely break the rules on how to operate and compete. These companies now need more than just a platform strategy, they need a robust ecosystem approach.

**Invent Your Future**
On-demand labor platforms + surging online management solutions = talent marketplaces driving the most profound economic transformation since the Industrial Revolution.

**Inspire New Behaviors**
Technology design decisions are being made by humans, for humans. Technology is adapting to how we behave and learning how to enhance our lives.

**Invent New Industries, Set New Standards**
To succeed in today’s ecosystem-driven digital economy, businesses must seize opportunities to establish rules and standards for entirely new industries.

DON'T FOLLOW DIGITAL TRENDS. START THEM

DIGITAL TRANSFORMATION IS A JOURNEY WHICH NEEDS TO BE SUPPORTED BY LEADERSHIP

Advocate digital transformation and the customer experience at an executive level
Digital transformation requires company-wide buy-in, with strong collaboration and evangelism from leadership – no one person alone can make it happen. Company culture and education on digital transformation are also key, and a vital part of the plan.

Execute change within the context of an end vision
Having a clear vision for the end state is critical to success, even if the vision is a moving target. Standardizing on a core set of technologies that the business can build around is a great way to accelerate change and keep the organization connected.

Find partners whose capabilities complement your own
All companies, even digitally mature ones, will have new gaps in capabilities as technologies continue to evolve. Enlisting third-party solution providers – that understand your broader strategies, strengths, and internal capabilities – is often cheaper and faster than building those capabilities internally.

Be willing to take risks and learn from mistakes
Companies and organizations must be willing to take risks and learn from mistakes. Through agile processes, businesses should adopt the spirit of digital transformation with reasonable risks, streamlined processes, and relationships with third-party solution providers to implement new capabilities over time.


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THE TEAM BEHIND THE PROJECT
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THE
100
SWISS COMPANIES
INDEXED
# THE 100 SWISS COMPANIES INDEXED

## A-Z

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<th>Aevis Holding</th>
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