

# THE WORK AHEAD

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The End of Work as We Knew It





**Even before the pandemic, work in all its forms was poised to change.** Data-intensive and digitally oriented ways of working were set to boost agility and increase business insights across the organization.

Now, the future of work is suddenly the present of work, essential for surviving both the pandemic and the expected global mega-recession, according to our forthcoming “Work Ahead” study.


## Executive Summary

When the COVID-19 pandemic first struck, companies faced an unprecedented series of shocks. Customer needs and behaviors morphed overnight as towns and cities emptied, and workplaces shut down.

Technology, business and operating models all struggled as the disruption intensified. Leaders scrambled to scrutinize everything, from how and where employees worked, to how they engaged with customers, to which products and services were viable.

As the pandemic progressed, digital touchpoints with customers, employees and suppliers were essential survival tools. Businesses armed with deft, data-driven capabilities won a head start for their survival: Food wholesalers pivoted [from restaurant supply to home delivery](#); sportswear manufacturers [produced personal protection equipment](#) for healthcare workers with the help of 3-D printers; [electronics companies rapidly repurposed supply chains to produce ventilators](#) with technical designs co-shared across disparate value chains; banks adapted to the rise of a cashless society as people shunned hard currency and digital wallets gained traction; and remote learning supplanted physical classrooms in schools and colleges. It was crystal clear that those organizations with data mastery at their core were best able to pivot, adapt and reinvent themselves on-the-fly.

The future-forward script for businesses everywhere has crystallized: Flexible, data-intensive and digitally oriented ways of working will be indispensable for weathering what's expected to be a [global mega-recession](#). When the virus recedes, its lasting impacts will be plain to see as businesses scrap traditional ways of working, reset their workforce and double down on their technology investments.



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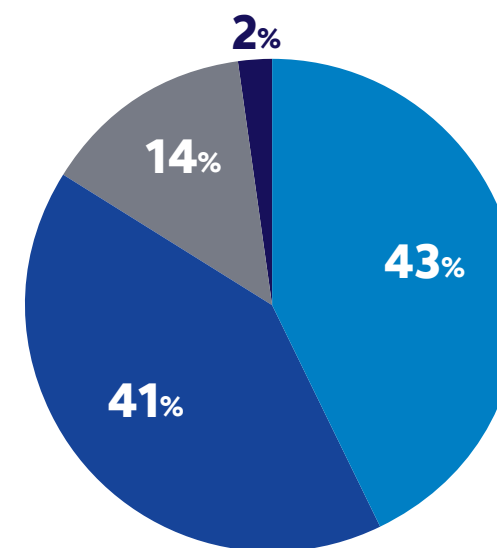
Well before COVID-19 struck, we had been studying the long-term business implications of our expanding digital world. Our findings coalesced in our 2016 “[The Work Ahead](#)” report, based on a global study of 2,000 senior leaders. Earlier this year, we worked with Oxford Economics to re-launch the study, with 4,000 C-suite respondents across 15 key industries, throughout the Americas, EMEA and APAC (see methodology, page 11). As the pandemic took hold, we urgently extended our research to assess how the crisis impacted the strategic calculus of leaders at organizations worldwide.

Our interim findings (based on 2,000 survey responses) reveal an executive class grappling with an unprecedented series of shocks, undulating across functional areas and spaces – both virtual and physical. The challenge for leaders is multidimensional and acute. When the virus struck, nearly all businesses (84%) took action of some sort to ameliorate its impact, according to our study. Of those businesses, 9% took significant measures enterprise-wide, while 32% made changes in targeted areas of the business, for a total of 41% (see Figure 1). Some businesses [went into survival mode](#), with plans designed to stave off the most severe impacts of the virus, such as disrupted supply chains or cash/liquidity pressure. Now, decision makers need to assess which imperatives are temporary, and which will persist even after the prolonged pandemic is a distant memory (hopefully soon).

The “Work Ahead” research series, due later this year, will interpret the findings both globally and across individual geographies, industry sectors and technology vectors. In this preview, we’ve analyzed our interim findings to define five key takeaways for how to best prepare for the aftermath of the COVID-19 crisis.

## COVID-19 disruption demands a plan

Respondents were asked to rate how strongly they agreed or disagreed with the question, “How is your business responding to the impact of coronavirus this year?”



- Taking some significant actions but mostly continuing business as usual
- Taking significant actions in some or all parts of the business
- Have taken no significant actions but evaluating or planning to soon
- Continuing mostly business as usual

Source: Cognizant Center for the Future of Work  
Response base: 2,000  
Figure 1



# 1

## Employee needs take center stage

When asked how the pandemic would impact their business and workforce over time, leaders said they will prioritize employee welfare and safety. Greater recognition for employees is job one (see Figure 2, page 7).

Leaders will value and pay their frontline workers more as a result of the virus (58%), and will prioritize workforce safety (57%). The prospect of reopening any business depends on guaranteeing worker health and well-being.

**What it means:** While employee compensation and safety are understandably top of mind right now, these priorities may fade over time as new economic and labor dynamics shape workforce strategies. Designing new compensation models when millions of workers have faced layoffs, furloughs or other uncertain employment futures will prove daunting.

Our study reflects respondents' sense of a moral imperative to better value workers on the front line, but there's also the economic imperative to survive. What organizations can do is ensure the workplace inspires trust and confidence for the workforce that occupies it. Real-time sensors, for example, can yield data insights that ensure safe conditions, such as ventilation rates and occupancy restrictions [protecting the health and well-being of employees](#).

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## 2

### The WFH boom is a temporary blip

Surprisingly, less than one-third (26%) of respondents expect employees to spend more time working from home in the aftermath of the virus (see Figure 2, next page).

Beyond Twitter, Facebook or a clutch of industry outliers, leaders it seems, [still want the workforce physically co-located](#). At the same time, respondents also revealed a greater openness to allowing employees to work from home as a result of the pandemic, with leaders expecting to adjust their HR policies to account for more remote work (43%).

**What it means:** Having employees on-site in the office, factory or shop floor delivers a multitude of benefits that long-term working at home fails to do. People like the camaraderie of working alongside one another, and the conversations around the watercooler provide insights that hours of online meetings fail to do, even in a world of Slack and Microsoft Teams.

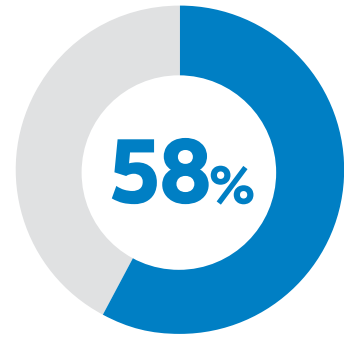
Moreover, those at the start of their careers need mentoring and guidance about how to navigate company dynamics – discussions that might not be committed to an email but warrant a quick question with a nearby colleague.



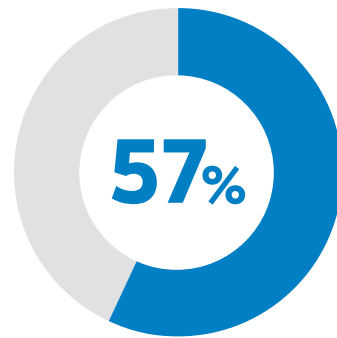
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## COVID-19 catalyzes modern work

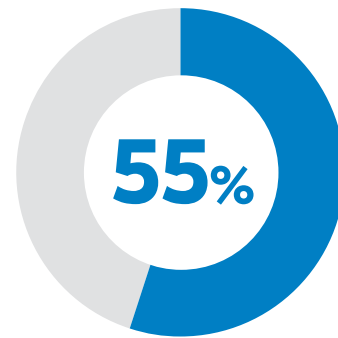
Respondents were asked to rate how strongly they agreed or disagreed with the following statements about the impact of the pandemic.  
(Percent of respondents who answered “agree” or “strongly agree.”)



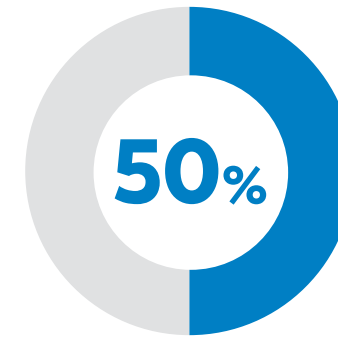
We will value and pay essential, frontline workers more



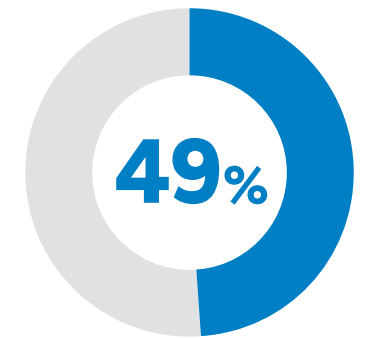
We will need to pay more attention to workforce safety



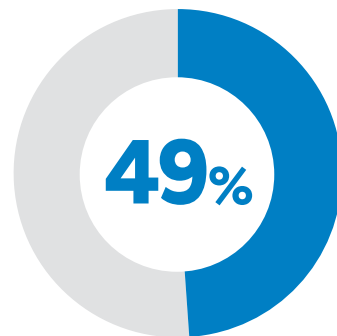
We will have to redesign the workplace to accommodate safe distancing



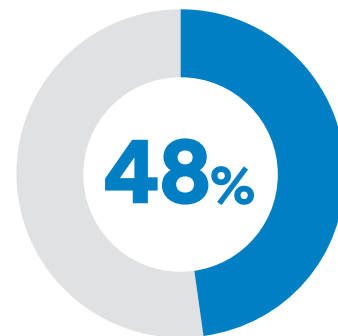
The pandemic has accelerated the adoption of new, digital, working practices



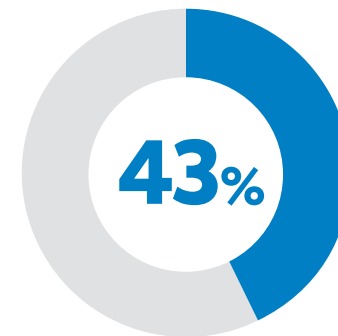
Our employees will work more in flexible teams than functional departments



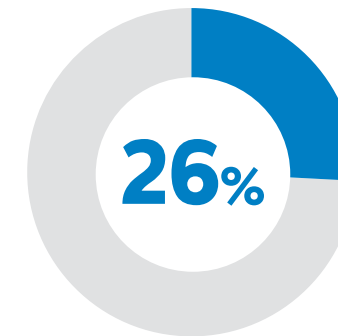
We need to redesign our supply chain to build in greater resilience to shocks



The pandemic will accelerate the destruction of many traditional, non-digital businesses



We will have to introduce new HR policies to adapt to more remote working



Our workforce will spend more working time at home

Source: Cognizant Center for the Future of Work  
Response base: 2,000  
Figure 2

## 3

## Digital, data-intensive ways of working will accelerate

Half of our respondents (50%) expect accelerated adoption of data-intensive, digitally oriented processes and work tasks (see Figure 2, page 7).

Data, analytics and machine learning are set to be critical competencies for the successful businesses of the future. The influx of these technologies into enterprise process work will drive an unprecedented expansion in the need for highly skilled labor as organizations meld humans and robots into a cohesive workforce that enhances individual, personal and collective corporate productivity.

**What it means:** New relationships between people and machines will emerge as organizations look to harness the power of both together. The most significant performance improvements will be realized when people and machines are brought together for their complementary strengths – the judgment, teamwork, creativity and social skills of the former, and the speed, scalability and quantitative capabilities of the latter.

Emerging human-to-machine workflows will demand robust people management processes to be developed in tandem, so that workers feel invigorated by these new tools, and secure in their use. Organizations will need to reimagine tasks and restructure teams, ensuring that the current workforce has the hard (job-specific) and soft (communication) skills to thrive. [New jobs will emerge](#) that require a fundamental relook at how organizations develop, source and retain talent.

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## 4

## Agile teams focus corporate firepower

Nearly half of respondents (49%) expect flexible and multi-disciplinary teams to emerge as a lasting impact from the pandemic (see Figure 2, page 7).

In this work model, agile processes are executed by networks of teams, operating in a work culture characterized by flatter management styles and more autonomy rather than departmentalized structures that are bureaucratic and slow to change. Rapid learning and fast decision cycles are enabled by a strong IT foundation and a common purpose of co-creating value for stakeholders. For example, during the pandemic, we witnessed the rise of [public-private alliances](#) between governments, regulators, life sciences companies, healthcare providers, startups and scientists, all coalescing in an attempt to find effective treatments and, ultimately, a vaccine.

**What it means:** Agile organizations emulate the speed, dynamism and customer centricity that distinguish digitally native competitors that can pivot just as quickly as customer needs do. These businesses empower teams to swarm around specific challenges. For example, instead of concentrating technology professionals in a centralized IT department, leaders will embed software designers and engineers in independent teams, where they can be quickly and easily deployed on high-priority goals.

Expect to see multi-disciplinary teams emerge across functional departments. These teams will comprise a diverse mix of expertise drawn across functional boundaries: Product and marketing specialists will work alongside commercial experts, data scientists and UX specialists on a common strategic goal or aligned with a customer journey.

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## 5

## Industry disruption intensifies

Nearly half of respondents expect supply chains will need to be reconfigured (49%), especially as the pandemic accelerates the destruction of many traditional, non-digital businesses (48%) (see Figure 2, page 7).

As the virus progressed, supply disruption hit businesses across industries – from healthcare and life sciences to manufacturing and retail – adding to the challenge of responding to shifting customer behaviors.

Previously, many digital alternatives – whether for finance, traditional healthcare, education, etc. – existed; there just weren't that many incentives for businesses or customers to use them. When the pandemic took hold, however, necessity dictated: "Get over it, get going, get used to it." Many of those changes to consumer and business behaviors are expected to persist, disrupting conventional ways of working in their wake.

For example, retailers had to rapidly innovate, quickly adopting "try-before-you-buy," "pay later" and curbside pickup services as a result of the virus, even among new demographics such as senior citizens. Many retailers are now reviewing the amount of physical store space they will need when the virus recedes.

**What it means:** Supply chains built for cost efficiency rather than resilience were stretched to the breaking point as the virus started to shut down the world. Now, expect moves away from "just-in-time," component-based manufacturing, for example, and significant shifts toward systems and processes that reinforce resilience (e.g., stockpiling, excess capacity, duplicated systems) vs. efficiency.

The way consumers engage with and consume products and services has irrevocably changed as a result of the virus. In just a few painful weeks, elegant, secure, scalable online content with a plethora of digital touchpoints went from nice-to-have to essential for every consumer-facing industry. Linking digital and physical channels to identify, engage with and activate consumers will be a necessary capability to avoid the possibly worse ravages of a predicted severe global recession.

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## Bottom line

Everything leaders do now must be about making the organization flex to first survive and then thrive. Rapidly changing customer habits, along with a raft of new business models and a revised competitive landscape, sharpen the demand for innovation from a knowledge-intensive workforce that can adapt and pivot with insight and foresight.

Start by reconfiguring enterprise work, teaming people with machines and bringing both sides together intimately, iteratively and inextricably. This is the work that matters right now as technology plays a massive role in every organization's future success.

## Methodology

The “[Work Ahead](#)” research series provides insight and guidance into how business and jobs will evolve as advanced technologies increasingly underpin economic performance. For the 2021 edition, we commissioned Oxford Economics to survey 4,000 senior executives, across 15 industries in North America, Europe and Asia Pacific. This preview focuses on the lasting impact of the COVID pandemic on workforce strategies by analyzing interim survey data from 2,000 executive responses: 36% of respondents were from North America, 31% from Europe and 33% from Asia Pacific. The full “[Work Ahead 2021](#)” research series will be published later this year and into next year.

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## About the Author



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Euan Davis leads Cognizant's Center for the Future of Work in EMEA. A respected speaker and thinker, Euan has guided many Fortune 500 companies into the future of work with his thought-provoking research and advisory skills. Within Cognizant's Center for the Future of Work, he helps ensure that the unit's original research and analysis jibes with emerging business-technology trends and dynamics in Europe, and collaborates with a wide range of leading thinkers to understand how the future of work will look. Previously, Euan held senior analyst, advisory and leadership positions at Forrester Research, IDC and CEB.

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### About The Center for the Future of Work

Cognizant's Center for the Future of Work™ is chartered to examine how work is changing, and will change, in response to the emergence of new technologies, new business practices and new workers. The Center provides original research and analysis of work trends and dynamics, and collaborates with a wide range of business, technology and academic thinkers about what the future of work will look like as technology changes so many aspects of our working lives. For more information, visit [www.cognizant.com/futureofwork](http://www.cognizant.com/futureofwork), or contact Ben Pring, Cognizant VP and Managing Director of the Center for the Future of Work, at [Benjamin.Pring@cognizant.com](mailto:Benjamin.Pring@cognizant.com).

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### About Cognizant

Cognizant (Nasdaq-100: CTSH) is one of the world's leading professional services companies, transforming clients' business, operating and technology models for the digital era. Our unique industry-based, consultative approach helps clients envision, build and run more innovative and efficient businesses. Headquartered in the U.S., Cognizant is ranked 194 on the Fortune 500 and is consistently listed among the most admired companies in the world. Learn how Cognizant helps clients lead with digital at [www.cognizant.com](http://www.cognizant.com) or follow us [@Cognizant](https://twitter.com/Cognizant).



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