



accenture

Honing your digital edge

Improve digital fluency to drive business results

2020 Accenture Global Digital Fluency Study

Being digital used to be an aspiration. Now it's an imperative for survival.

Almost overnight, organizations worldwide had to move the majority of their workforces and operations off-site due to the pandemic. This feat would not have been possible without digital technology. Digital transformation has been a priority for companies in recent years, with talk about managing change, equipping workers with digital skills and moving to the cloud. Today, this move is no longer an aspiration. Being digital has become an imperative for survival.

Unlock your people's potential alongside digital transformation

Accenture Research talked to more than a dozen chief information officers (CIOs) who shared their success stories and concerns for the future.¹ Remarkably, during the pandemic, many technology leaders were able to take their 18-month digital transformation plans and execute them over a weekend. The speed of these digital transitions was unprecedented. However, not all organizations have built on this digital opportunity to create a thriving enterprise.

Our 2020 Accenture Global Digital Fluency Study shows that just 14% of companies are digitally mature.² The organizations that are most digitally fluent can capture strong returns in innovation, people experience and customer value because their workforce has learned to be agile.

Business leaders—and workers, too—are struggling to navigate this new technology-enabled world of work. Many companies weren't prepared for the abrupt transition. Our research shows that more than 60% of workers are working remotely, yet fewer than half of the companies we surveyed did not have company-wide remote policies in place as of August 2020. One-third of workers were using their own devices for work, and 25% of workers were experiencing regular issues with their remote technologies.

To be successful, workers need to have access to digital tools and training—but also leadership and cultural support—to unlock their full potential and ingenuity.

Digital fluency defined

Digital fluency is an integrated framework measured by your digital workforce's technology quotient (TQ) + digital operations + digital foundations + digital leadership and culture.

When all four facets are in place, workers gain agility, and the organization leads in key performance metrics such as innovation and customer service.

Remote work is here to stay, so it's time to adapt for the long term and turn the change into a game changer.

“

We quickly uplifted all the same technologies, processes and ways of working into the home without actually reimagining the work experience. New technologies and new ways of leading and working are required if we are to sustain this shift in the long run.

– People experience officer

Emerging stronger in a digital world

Organizations are moving forward at speed and therefore just as quickly need to figure out how to improve performance in a digitally enabled environment. Through our research, we have uncovered many answers.

In this report, we explore the:

01. Pursuit:

Why is digital fluency so important, and how can organizations increase their digital fluency to achieve revenue, innovation and customer satisfaction outcomes?

02. Personas:

Our research uncovered four digital personas that reveal distinct patterns of digital workers. Understanding these personas allows business leaders to identify them in their own workforce and close necessary skills gaps.

03. Plan:

We explore how to adapt to change and equip the workforce to succeed in a digital environment.

These findings and recommendations will help your organization better understand how to sustain a digital way of working and not just survive—but thrive—in this new world.





01. Pursuit

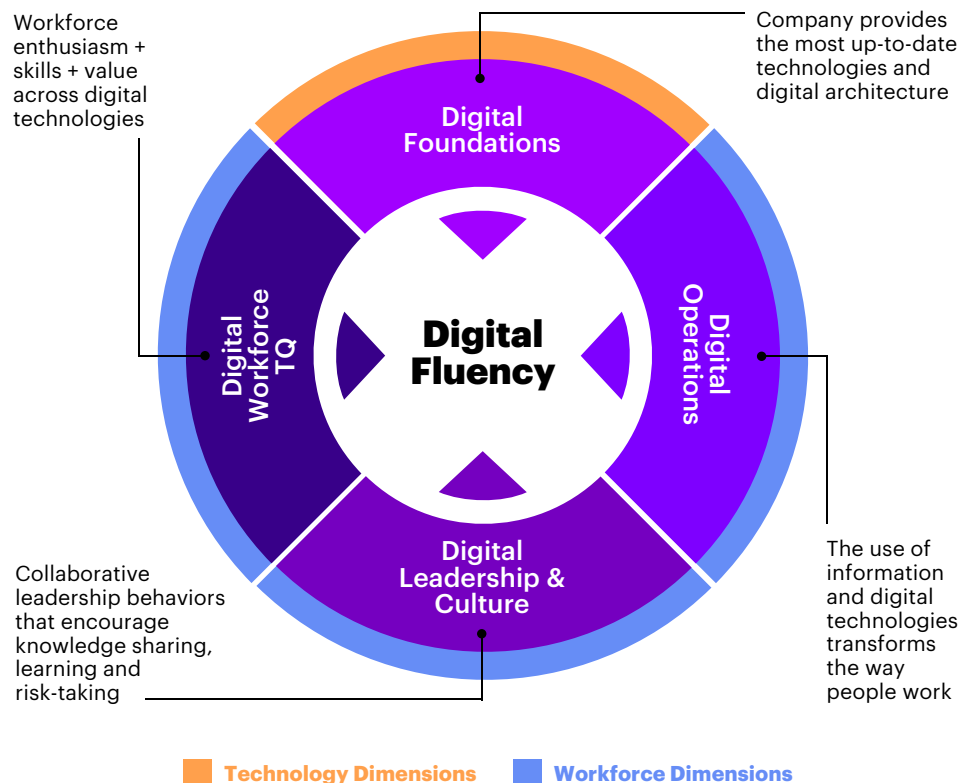
Becoming digitally fluent

Digital fluency should be thought of in a manner similar to how people use languages. If someone is **literate** in a language, they understand the basic tools of speech, such as reading and speaking. However, if someone is **fluent** in a language, they are able to create something new with the tools, such as craft a poem or engage in robust conversation.³ Fluency unlocks newfound knowledge, creativity and innovation that literacy cannot enable on its own.

Being digitally fluent is no different. **Digital fluency allows people to build on technological foundations and not just work alongside them, but also to unleash newfound creativity and ways of working.** It may be no surprise that our research found digital fluency to be the lynchpin to unlocking workforce agility. We found that our digital fluency framework (see Figure 1) predicts and explains 54% of a worker's ability to be agile.⁴

Digital fluency is the missing ingredient in many digital transformation efforts. In many cases, it's not the technology itself that is holding back an individual, but the lack of digital infrastructure, culture, leadership and skills, which are required to thrive alongside technologies.

Figure 1. Becoming digitally fluent: A framework



Source: 2020 Accenture Global Digital Fluency Study

Why digital fluency?

Digitally fluent companies are leading the pack in revenue growth.⁵

2.7x

more likely to have experienced high revenue growth (**over 20%**) over the past three years

5.4x

more likely to still be projecting high revenue growth (**over 20%**) in the next three years

Digitally fluent organizations are also winning with their customers and workers, and they are leaders in innovation and operational efficiency.

69%

are considered a great place to work by their workers

68%

lead their peers in customer satisfaction

62%

lead their peers in innovation

61%

lead their peers in operational efficiency



02. Personas

Get to know your digital workforce

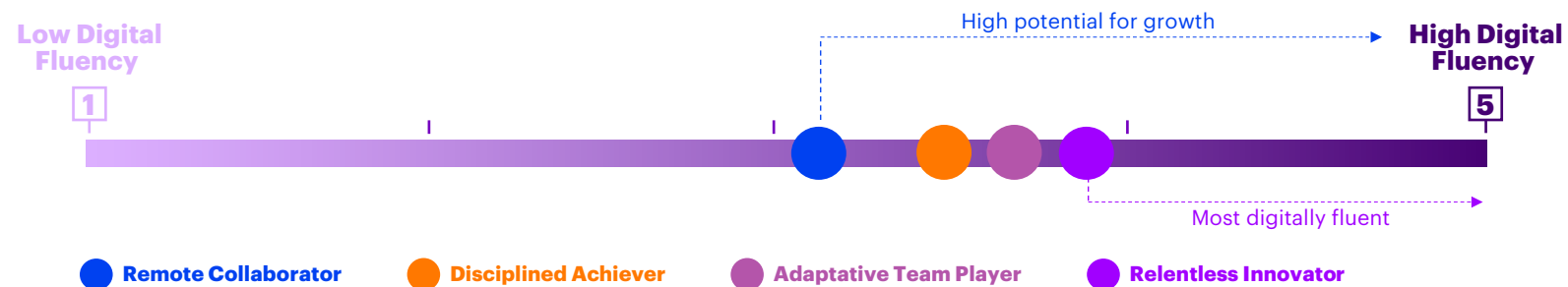
The digital fluency framework simplifies the complexity of honing your edge with the help of a digital workforce, but it is not a one-size-fits-all formula. We mined our research data for distinct patterns that would show different types of digital workers. We found four statistically unique “people” in our data set.⁶ These personas include:

- **Remote Collaborator**
- **Disciplined Achiever**
- **Adaptive Team Player**
- **Relentless Innovator**

These four personas show up across all industries, geographies and functions. And each of their digital experiences differs depending on their own unique needs, tenures, comfort with remote work and perceived digital support.

Each persona comes with their own unique needs and readiness to be digitally fluent. Identifying these people in your own workforce allows you to accelerate closing your digital skills gap to unlock greater agility.

Figure 2. Digital workers on the digital fluency spectrum



Note: The scores for each persona is the average score for each of the four facets of the digital fluency framework

Source: 2020 Accenture Global Digital Fluency Study

01 Remote Collaborator

Who am I?

Engaged. Experienced. Enthusiastic.

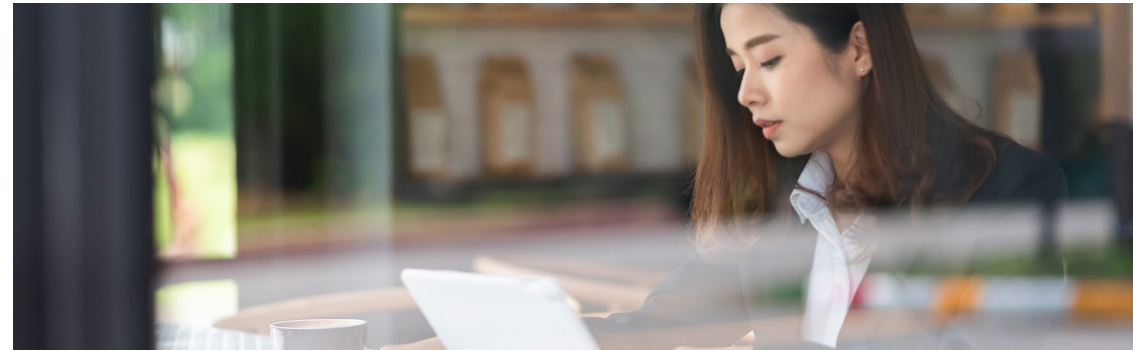
- I am motivated by feeling a sense of belonging in my organization.
- I am new to remote work and appreciate the newfound flexibility in my schedule.
 - 72% of people in this persona had no experience working remotely.
 - Highest percentage of Gen Xers (born between 1965 and 1979).
- Likely to be in a middle manager role with long tenure at the organization.
 - 50% have 6+ years at current employer.

What do I want from my employer?

- I thrive when working in an environment where I feel supported and cared for by leadership.
- I am a self-starter and can work amid ambiguity; please don't micro-manage me.
- I want flexibility so I can continue to balance my work and home life.
- I enjoy using technologies so I can deliver high-quality customer experiences from afar.

How can my organization build my digital fluency?

- I want help seeing how digital technologies can add greater value to my work.
- I would like a learning journey/roadmap with dedicated milestones to help me build new skills.
- I want to learn from others through cohort models.
- I would like to be recognized when I obtain new skills. Digital badges may be useful so my peers can see my value.



02 Disciplined Achiever

Who am I?

Participatory. Helpful. Eager to learn.

- I enjoy feeling a sense of belonging in my organization.
- I am most likely to be an individual contributor.
 - 91% are below manager level.
- I have less education than the other three personas.
 - 39% have a 2-year associate's degree and actively seek new educational opportunities as a result of the global pandemic.

What do I want from my employer?

- I thrive in well-defined structures and prefer clear roles and responsibilities.
- I enjoy collaborating and knowledge sharing across my organization.
- I look for leaders who care for my well-being and are available to me.
- I enjoy working for a company that is operationally efficient and builds skills among its workers.

How can my organization build my digital fluency?

- I want to work in cross-functional teams to see how digital enables different parts of the organization.
- I would like clear learning goals and to be held accountable for obtaining digital skills.
- I wish to be rewarded when I develop skills and find new ways in which technologies can add value.
- I want to use gamification to help me build new skills.



03 Adaptive Team Player

Who am I?

Flexible. Emerging talent. Personable.

- I am most likely to be an early career professional.
 - 73% of people in this persona were millennials below manager level.
 - Highest portion of Gen Z (born after 1997).
- I have low tenure at my current organization.
 - 40% have only 1-3 years at current company.
- I am not comfortable with remote work.
 - 70% were not working from home prior to COVID-19 and miss the in-person interactions.

What do I want from my employer?

- I am looking to obtain the skills I need to be marketable.
- I want to work in team-based environments that challenge me.
- I prefer ongoing communications from my leadership.
- Transparency and trust will earn my loyalty.

How can my organization build my digital fluency?

- I would like a cohort learning model, as I am enthusiastic about new tools, technologies and teammates.
- I would like to be matched with Relentless Innovators on projects so that I may learn and grow my skills.



04 Relentless Innovator

Who am I?

Smart. Seasoned. Exploratory.

- I am highly educated.
 - One-third of workers in this persona have an advanced degree (master's degree or higher).
- I am likely to be in a leadership role with moderate tenure.
- I have previous remote working experience and I am comfortable with digital work.
- I excel at applying digital technologies and seek to push digital boundaries at work.

What do I want from my employer?

- I am motivated by purpose and seeing the bigger connection my work makes to others.
- I need space and time to explore and pilot new ways of working alongside technologies.
- I enjoy learning and am self-directed to engage in improving my skills.
- I want to bring strong governance and ethics to my workstreams.

How can my organization build my digital fluency?

- I want strong technology infrastructure and tools to keep exploring the boundaries of the digital frontier.
- I want to lead digital pilots and agile ways of working.
- I want to be encouraged to participate in hack-a-thons that meet broader societal needs.





03. Plan

Amplify your edge

Business leaders have made the move to digital. But it's now time to sharpen your digital edge by promoting digital skills and adoption in the workforce. The entire C-suite—from the chief executive officer to the CIO and chief human resources officer—has a role to play in equipping workers with the right digital infrastructure, culture, leadership and skill-development opportunities to thrive alongside technologies.

The digital fluency framework is a smart way to plan for the path forward.

Build a digital foundation

COVID-19 highlighted the gap between the high-performing digital-savvy companies and under-performers. **Digital transformation empowers an organization to be more efficient and ready for change, creating new experiences for workers and customers alike.** Some of the emerging technologies that are an integral part of digital fluency, such as cloud, can equip the business to pivot quickly amid change and allow for the democratization of AI, robotics and self-enablement for workers. But someone must lead the organization's journey to honing its digital edge.

The CIO has an integral role to play on the journey—yet the role itself has changed. The CIO is no longer the purveyor of services to the business. Digital has become embedded in the way the business works. The CIO can help lead the journey and set the timeline for building the digital foundation, from rotation of applications and data to cloud-based solutions, to creating a digital workplace rich with opportunities for self-enablement and automation.



Improve workforce TQ

The workforce's technology quotient (TQ)—workers' enthusiasm, expertise and value seen across technologies—is an important part of the digital resiliency framework. Organizational psychologists long ago determined that to move the needle on digital adoption, three factors need to be in place:⁷

The right attitude. People must be enthusiastic about the topic.

The right skills. People need to have the actual skills and competencies in place to be successful.

Social relevance. People must see that it's valuable to the job and organization.

Few digital skilling initiatives take all three facets into consideration. Our study uncovered that although digital tools and technologies are valuable to many, when it comes to skills, workers lag far behind (see Figure 3).

Figure 3. Understanding the current global digital workforce TQ

Technology	Total Workforce TQ score
Digital collaboration tools	3.5
Robotic process automation	3.3
Cloud computing	3.2
Applied intelligence	3.2
Cybersecurity	3.0
Internet of things (IoT)	3.0
Statistical analysis	3.0
VR/Extended reality	2.7
Blockchain	2.6
Robotics	2.5

Source: 2020 Global Digital Fluency Study, Accenture; Note: n=4,500 global workers; TQ score is calculated from a scale of 1-5, with 1 being the lowest TQ (strongly disagree) and 5 being the highest TQ (strongly agree).

Use data analytics to determine the readiness of your workforce to work alongside technologies.

Where is the gap—in their enthusiasm, skill set or relevancy of value? What does each persona need to increase their TQ levels? Design performance, rewards and learning around each type of digital worker. For instance, one might want public acknowledgement, such as a digital badge, whereas others may want monetary benefits. Others may want flexible learning time that is either individual-based or in a cohort model.

Enable digital operations

Organizations must infuse digital technologies, such as cloud, into daily operations to enhance performance. These technologies enable people to work more efficiently, make informed and fast decisions and be more responsive to changing business needs. But it is not as simple as just digitizing processes. Digital transformation must be viewed more holistically with considerations about how it affects processes, policies and the ways in which people work and interact with customers.⁸

When the technologies are there and people are equipped with the right skills to use them, it can transform ways of working to benefit the business as a whole.

For instance, enabling greater access to information can help people to be more effective in their jobs. But people need to understand the value these innovations bring. Otherwise, technologies sit idle and are not brought to bear to improve day-to-day work.

Shape a culture of digital leadership

Digital transformation affects all aspects of business. For it to work, the digital foundation, digital operations and digitally skilled workforce collectively need the backing of leaders and a culture that is aligned on digital. What should new work structures look like? How should roles and responsibilities evolve? In what ways can digital enable better knowledge sharing and collaboration? How can leaders be trained to communicate better, have greater empathy and earn trust in a remote work environment?

Digital introduces new challenges for workers, but it can also solve many of them. For instance, as remote work takes hold, people may be in greater need of flexible work arrangements. They may want opportunities to co-innovate and they may want access to training that enables them to develop the right skill sets to transition into higher-paying jobs and explore new roles and industries. Digital is what can make all of this possible.

The digital fluency framework is a smart way to plan for the path forward.

Cloud Spotlight

Cloud computing technology is a great place to start building your workers' skills for maximum return. Our research shows that cloud rates high on enthusiasm and relevancy for all types of workers across levels, industries and geographies.⁹ Half of our respondents showed strong enthusiasm on learning cloud computing, and the same number agreed that cloud will add value to their jobs. However, only 35% acknowledged that they are currently skilled in this area. Those who expressed strong cloud skills were most likely to be found in the IT function with advanced degrees, yet other cloud skills that extend beyond IT are just as important, such as using cloud for project management, problem solving, collaboration and communication.



As it relates to enthusiasm for the cloud, 51% are millennials, showing the next generation of leaders are eager for cloud adoption. In addition, cloud computing was selected as one of the top two technologies among the 10 tested, slightly behind robotic process automation, for global workers most interested in developing their skill sets in the near future. As a result, cloud computing appears to be moving from emergent to mainstream, and organizations and workers who are able to capitalize on this opportunity are likely to experience higher performance compared to their peers.

It is no longer optional to ensure a digitally ready workforce. Being digitally fluent will be key to future survival and growth. Our research shows there is a long runway ahead of many organizations. However, people are eager and ready to learn.

Where will you get started?

For more information:



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Eva helps clients harness digital technologies and evolve their workforces to innovate, unlock human ingenuity and drive transformation. Eva was recently recognized by the National Association of Corporate Directors as one of the most influential leaders in corporate governance for making a significant impact in boardrooms. Prior to Accenture, Eva sat on the board at Sapient, acquired by Publicis (now called Publicis Sapient) and Broadsoft, acquired by Cisco. She also served as CHRO of Gap, Inc. and in C-suite roles at PepsiCo, Disney and Sun Microsystems. She was a Senior Advisor at Boston Consulting Group and to G100 companies, supporting CEOs, board directors and CHROs.



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Emma helps clients achieve enterprise-wide transformation by bringing Accenture's deep technology, functional and industry expertise across SAP, Microsoft, Oracle, Salesforce, Workday, Adobe and other leading platforms. She also is the global lead for the Accenture Microsoft Business Group and Chair of the Board of Avanade. Previously she was group technology officer for Accenture's Communications, Media & Technology operating group. Emma was named as one of the 50 most influential women in UK IT by Computer Weekly magazine for four years (2015-2018) and was listed in Computer Business Review's 10 most successful women in UK technology.



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David has spent 20 years working with Accenture's largest high-tech clients, including large global software, internet service, and hardware / computer and network equipment providers. David's experience spans several talent-related areas including workforce planning, HR service delivery and process, capability development and learning, and transformational change management. He has extensive experience defining, delivering and leading high-impact change programs that involve the disruption of core enterprise strategy and processes.

References

- 1 Accenture Research conducted 15 interviews with global CIOs over March, April and May 2020 to better understand the challenges and opportunities of shifting a workforce at scale off premise.
- 2 2020 Accenture Global Digital Fluency Study. Digitally mature organizations were those that scored high in all four dimensions of the digital fluency framework. Unless otherwise noted, all research statistics reported are taken from this study.
- 3 For more on the nuanced differences between digital fluency compared to digital literacy please see: <https://www.scisdata.com/connections/issue-111/digital-fluency-vs-digital-literacy/>
- 4 A statistical regression model was built using the four dimensions of the digital fluency framework as independent variables to determine the extent to which they predicted the outcome of workforce agility. Workforce agility in this research was a multidimensional variable defined as a person who has the ability to adapt quickly to a change in direction and figure out a new solution; enjoys working in quickly responsive environments; works well under ambiguity; actively seeks out new ideas and exhibits a growth mindset.
- 5 A leader/laggard analysis was completed with a leader defined as scoring high (participant selected “agree” or “strongly agree”) across all four dimensions in the digital fluency framework. Laggards comprised the rest of the sample who did not meet this threshold. Comparisons were completed across these two groups (leaders vs laggards) in the sample with statistically significant differences reported.
- 6 A multivariate cluster analysis was completed to classify a sample of participants based on a set of measured variables into several different groups that share similarities. Our cluster analysis revealed four distinct groupings that share common and distinct digital workforce characteristics that are brought to life throughout the report in persona format. All reported findings on the persons derive from this multivariate cluster analysis.
- 7 To read more about the necessary conditions to create positive agency in the workforce, please see: <https://www.sciencedirect.com/topics/medicine-and-dentistry/theory-of-reasoned-action>
- 8 Julie Sweet. (2020). Accenture’s CEO: 5 rules of rethinking digital transformation during COVID-19, retrieved from <https://fortune.com/2020/06/26/coronavirus-accenture-ceo-digital-transformation/>
- 9 Cloud computing ranked 2nd out of the ten technologies tested when asking the workforce when thinking of their own professional development, which technology would they be most interested in developing their skillset?

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About the Research

The Accenture 2020 Global Digital Fluency Study aims to better understand the mindsets, characteristics and organizational levers that can be pulled to enable a digitally fluent workforce. We surveyed more than 5,400 workers across 12 geographies from May 2020 to August 2020. The geographies covered in our research are Australia, Brazil, Canada, China, France, Germany, India, Japan, Singapore, Spain, the United Kingdom and the United States. In addition, the research spans nine industries: Banking/Capital Markets, Communications, Media and Technology, Insurance, Consumer Goods and Services, High Tech, Retail, Aerospace and Defense, Energy, and Oil and Gas. Survey development and fieldwork undertaken with the assistance of Oxford Economics.

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