

BRAVE NEW WAYS OF WORKING



Cegos Asia Pacific Research Paper 2018

*How organisations across the region are
transforming to be fit for the future*

Leading a workforce fit to win

Cegos.com.sg



BEYOND KNOWLEDGE*

2018 Asia Pacific Research

Contents

02

Introduction by Jeremy Blain

03 - 04

Executive summary

CONCLUSIONS

05 - 06

1. Organisations must actively embrace digital disruption

07 - 08

2. Senior people should promote an innovation culture, leading by example

09 - 10

3. Managers must be proactive as well as reactive to rapid change

11 - 12

4. Worker flexibility is the way for forward, with a strong correlation to business success

13 - 14

5. Remote collaboration and communication skills cannot be ignored

15 - 16

6. There is an urgent need to refocus training on the future of work

17 - 18

7. Change is crucial for the future health of your business

19 - 20

8. The biggest challenges of business transformation

21

Further guidance

22

About the author

23 - 25

About Cegos group | Transformational learning solutions





Onwards to a brave new world

How the way we work is changing

Globalisation, digital transformation and new ways of working are changing our world at a frightening pace.

But with this change comes opportunity.

An opportunity to connect with others who would normally be outside our reach. An opportunity to work and learn remotely, no longer tied to the office or classroom. An opportunity to collaborate on an international scale, often in real-time.

And all these opportunities help us gain competitive advantage.

At Cegos, we work with many organisations who consistently make bold decisions to transform themselves into businesses fit for the future. Other organisations we meet remain immobilised, simply not knowing what to do next. The rest appear to be somewhere in between. This piqued our interest!

We were curious to see how these traits played out more broadly among businesses in the Asia Pacific region. Over three months, we ran a survey entitled *Brave New Ways of Working* to gauge how far organisations across the region were dealing with the need to transform and how they were implementing future-ready infrastructure within the workplace.

The focus within the research is representative of the most common themes we hear from our customers, enterprise experts, the media and bloggers on what constitutes the **main building blocks for business success** as we accelerate into the future.

We received almost 2,000 responses from business, HR and learning leaders in all the major ASEAN countries. Some markets fared better than others, but there was a startling and overriding message that came out of our survey results:

Leaders and managers across the APAC region must do more to embrace technological advances and inspire a culture of innovation, a change mindset and new ways of working. Otherwise, they risk falling behind their competitors.

The executive summary on the next page gives you an at-a-glance view of the whole picture. In the latter pages, we delve further into responses to each of the eight questions we asked and offer some ideas to inspire action in your own field.

Cegos Asia Pacific is proud to sponsor cutting-edge research that helps organisations navigate the waters of an uncertain future. The conclusions inform how we assist customers, largely by transforming learning for the digital era. Central to success is the right blend of appropriate technology and a strong human touch – arguably, more important than ever in these tech-driven times.

We trust you find food for thought within these pages. If you would like to discuss any of these issues further, don't hesitate to get in touch.

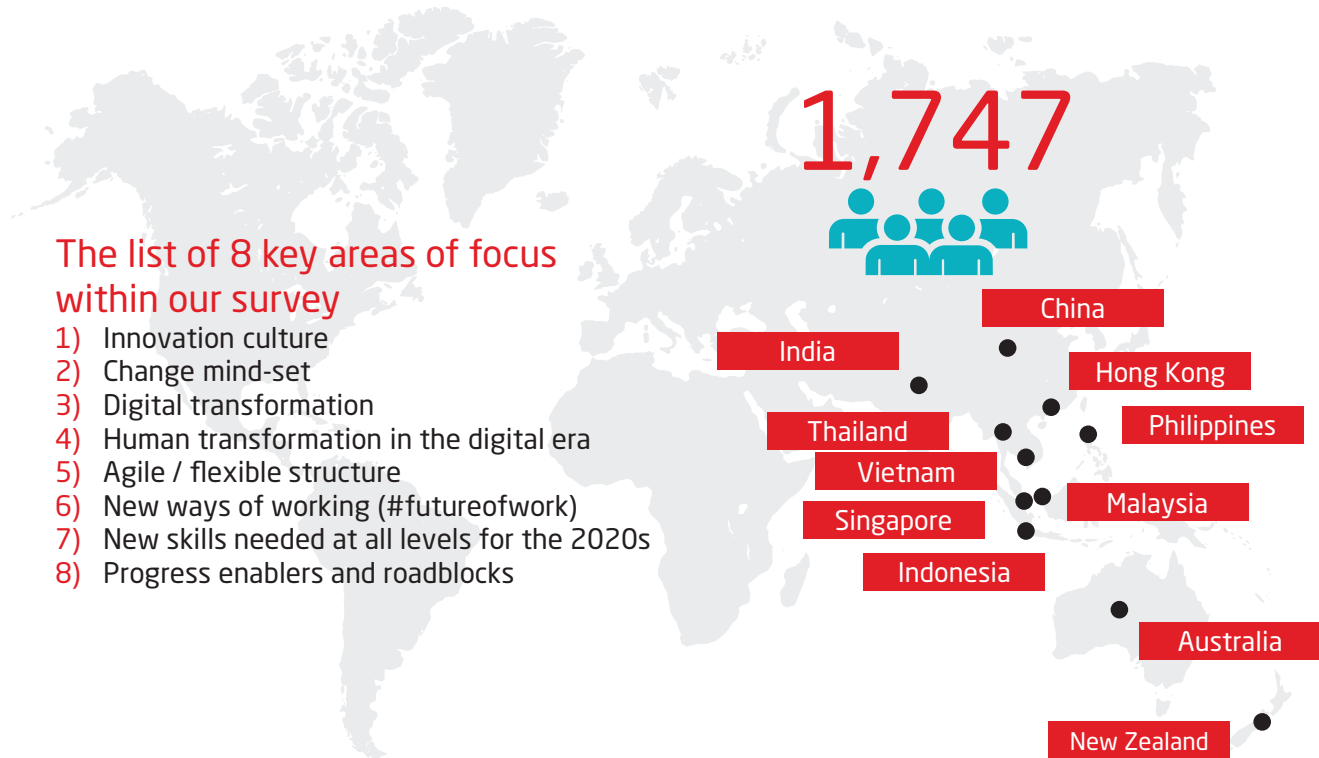
Jeremy Blain

Regional Managing Director, Cegos Asia Pacific

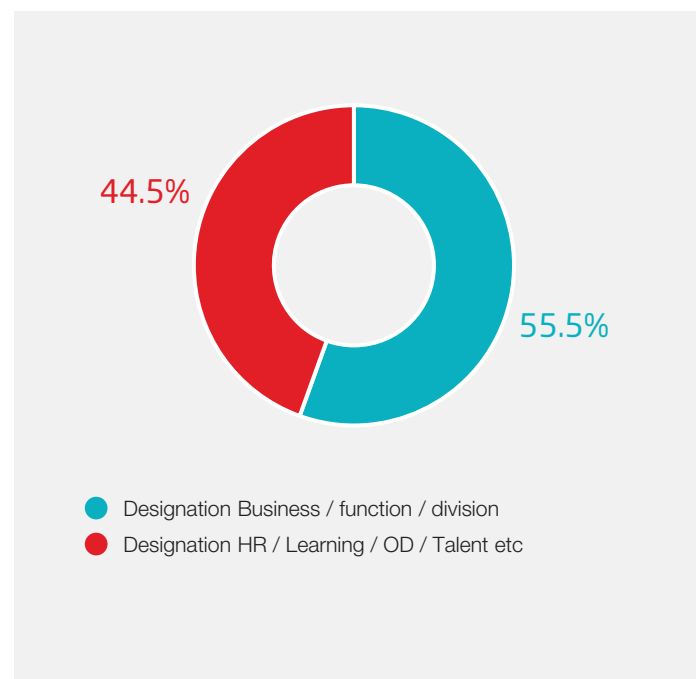
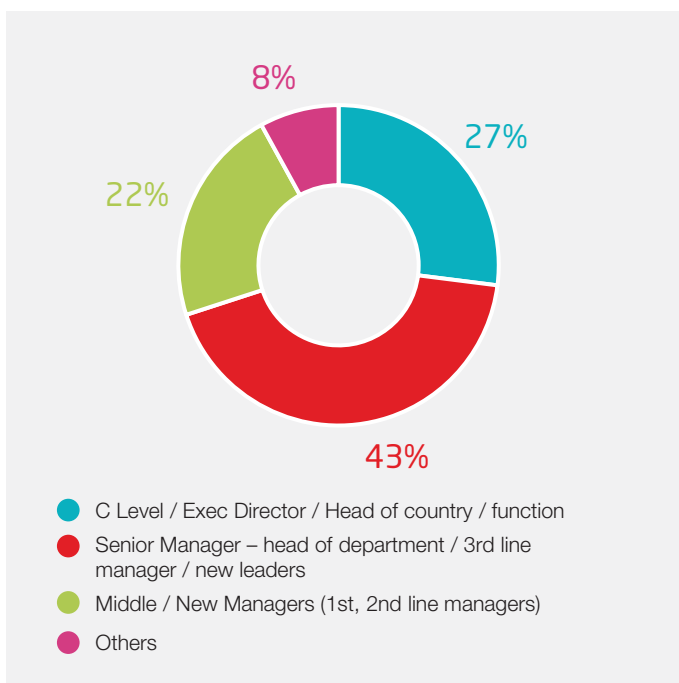
Executive Summary

8 Conclusions from 8 Questions

1,747 respondents – HR, business and learning professionals in multinational companies operating across Asia Pacific in ANZ, India, China, Hong Kong, Philippines, Singapore, Thailand, Malaysia, Indonesia, and Vietnam



Respondents by position



The success stories

- 1 Organisations are embracing digital transformation**
Companies are investing in and using digital technology to transform their businesses. But many respondents said there is room for improvement and acceleration.
- 2 Managers do well at reacting to rapid changes in their industry**
Good news in the short term. However, leaders must do more to help operational managers create a clear vision and direction.

The alarm bells

- 3 Senior leaders fail to promote a culture of innovation and lead by example**
Too much old-fashioned thinking. It is time for leaders to connect more with modern ways of working and be the change they want to see in their company.
- 4 Organisations are hindering productivity by being inflexible**
Leaders and managers are stuck in the past, too often relying on ridged hierarchies and office-bound infrastructure. Today, people want more freedom to work when and where they are most productive. And the companies who offer choice and flexibility invariably attract the best talent.
- 5 Managers do not manage remote collaboration and communications well**
Technology works best when it is properly implemented. More effort needs to go into managing online collaboration and communication, particularly as we see an increasingly independent workforce fuelling the 'gig economy'. However, managers rarely have the skills to manage in this way as they are seldom taught how to.

- 6 Organisational training does not address the impact of disruption on industry, nor the new skills needed to deal with it**
Businesses lack the training designed to help people learn the new skills needed to use technology. Organisations rely too much on what they know, selecting only traditional training topics that are largely classroom delivered. Corporate learning needs to regain the initiative and facilitate bold new ways of learning, focused on the skills organisations need to win in an increasingly pressured and competitive workplace. This is 'need to do' rather than 'nice to do'.
- 7 Organisations are stubbornly avoiding the change needed to protect the future health of their business**
Leaders and managers must look to the future and begin implementing changes to deal with it now, so they are not left behind when the change comes. This may well come with budgetary demands and should be viewed as an 'investment' rather than a 'cost'.
- 8 People are seriously concerned about the challenges of management commitment, clarity and direction, organisational culture and a change mindset**
Too much fuzzy thinking and management living in a bubble. Leaders must promote a culture of innovation and inclusivity, providing a clear vision for the business. They must then lead the change, visibly and positively, as role models for the rest of the organisation.

Responders say



“ We are a pre-seed stage tech start-up. Your questions represent our mission, way of working and prevailing culture. ”



“ Short term focus should be on the list! This is a big issue for us but relates well to clarity / direction and management commitment. ”



“ So much new regulation in our industry is taking our eyes away from preparing the business to be a success in 10 years' time. ”



1 Organisations must actively embrace digital disruption

1

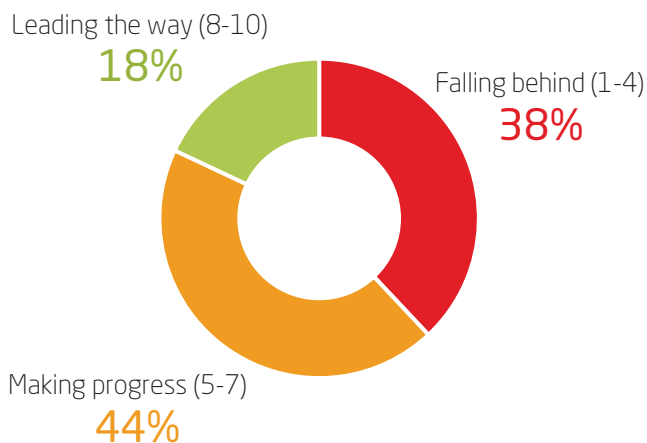
Organisations must actively embrace digital disruption



Question: How committed is your company to transforming the way it does business using digital technology?

Score

Response % (1= not committed at all; 10= 100% committed)



Top performers:



SINGAPORE



INDIA



CHINA

Low scorers:



INDONESIA

What does this mean?

Digital transformation is the business initiative of the age, and it looks like managers across the region are taking note. However, in 2018, things should be different – only a small minority are leading the way, with 4 out of 10 barely making an effort and reaching the tipping point of do or die. This is not a statistic for success.

Some markets are perhaps putting more trust in traditional face-to-face ways of working, but this cannot go on indefinitely, particularly in our increasingly globalised, cross-cultural workplaces.

The way forward

Leaders and managers who have yet to get the memo about digital transformation should look carefully at their future plans and act accordingly.

Younger generations expect to enter a workplace that is digitally connected. They have been educated to work on a range of platforms that facilitate peer-to-peer collaboration, and are highly skilled in doing this.

Leaders who have not yet invested in digital transformation should either consult the expertise within their organisations or outsource the initiative to companies with a proven track record of success.



“ Too much relying on a few good leaders to show the way – but they won’t be able to bring it to reality because our middle managers are simply not ready and not communicated to enough. ”

A human brain is shown from a top-down perspective, centered in the upper half of the image. The brain is rendered in a light teal color, contrasting with the darker, textured teal background. To the right of the brain, there are intricate, wavy, and marbled patterns in shades of teal and dark blue, resembling liquid or smoke. The overall image has a grainy, artistic texture.

2

Senior management should promote an innovation culture, leading by example

2

Senior management should promote an innovation culture, leading by example

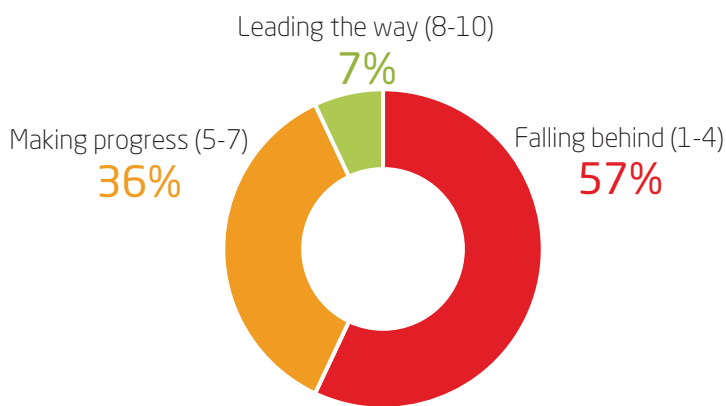


Question: How active are your senior leaders in promoting a culture of innovation across your organisation and leading by example?

"Innovation distinguishes between a leader and a follower."
Steve Jobs

Score

Response % (1= not committed at all; 10= 100% committed)



Top performers:



CHINA



VIETNAM



HONG KONG

Low scorers:



THAILAND



MALAYSIA

What does this mean?

Over half our respondents say there is very little culture of innovation in their organisation. Furthermore, there appears to be a distinct lack of leadership across the region when it comes to embracing an innovation mindset.

A recent report from McKinsey corroborates our findings, with over 70% of senior executives saying that innovation is an important driver for growth, but 65% reporting they lack confidence in managing and encouraging an innovation culture.

Interestingly, the usual high scorers appear somewhere in the middle here. It is no accident that two of the fastest expanding players across the APAC region are China and Vietnam, while those struggling with innovation and future transformation have among the lowest economic growth.

The way forward

Leaders and managers must wake up and set aside traditional models in favour of new ways of doing business.

They should be clear about what innovation looks like in their organisation. In addition, they should source new initiatives from middle-managers and other professionals, and set up a forum that encourages innovation. An element of trust between management and team is crucial to success here.

Finally, managers should invest in training that inspires new thinking along with an innovation mindset and a transformative outlook. Anyone doubting its impact need only look at what competitors and startup disruptors are doing, then aspire to do it better.



“ We have a great culture and it's absolutely down to a mindset change at leadership level – they are building innovation in at each level and it's infectious for the rest of the organisation. ”



3

Management must be
proactive as well as reactive
to rapid change

3

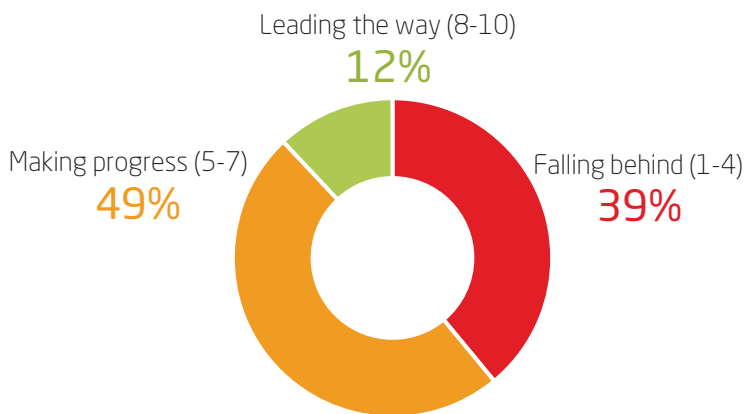
Management must be proactive as well as reactive to rapid change



Question: How well does your organisation manage and adapt to rapid changes in your industry?

Score

Response % (1= not committed at all; 10= 100% committed)



Top performers:



CHINA



SINGAPORE



PHILIPPINES

Low scorers:



MALAYSIA



INDONESIA

What does this mean?

Whilst many organisations are showing an ability to respond to rapid industry change, there is still a worrying number (according to nearly 40% of respondents) who are not.

China and Singapore – on a roll when it comes to setting new standards in industry – show an impressive streak here. On the other hand, results from Malaysia and Indonesia demonstrate that response to change is too slow against the pace of modern working and business development. The more fragmented the socio-political / economic landscape, the more difficult it seems to drive rapid change.

The way forward

Put simply, organisations need more training to adapt and respond to change, and that includes training for the top performers. Why? Because new technologies are being introduced all the time, so training programmes can become quickly outdated.

The more tools managers have at their disposal to respond to rapid change – and even predict it – the better they will be at managing it and inspiring confidence among their people.

Secondly, change initiatives should be built into the strategic plan, so that there is adequate space within the organisation to adapt quickly when necessary.



“ Our leaders seem to be clear, but the blocks are rather at first and second line manager. ”



4

Worker flexibility is the way forward, with a strong correlation to business success

4

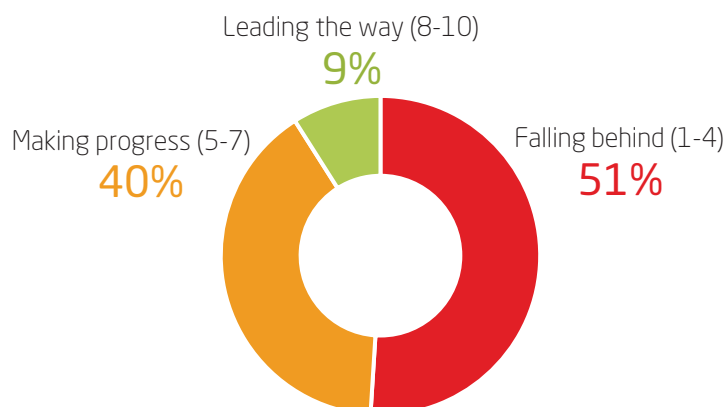
Worker flexibility is the way forward, with a strong correlation to business success



Question: How flexible is your organisation in terms of how, when and where your people can work?

Score

Response % (1= not committed at all; 10= 100% committed)



Top performers:



AUSTRALIA



HONG KONG

Low scorers:



INDONESIA



VIETNAM

What does this mean?

According to these results, around half of all businesses are still using the traditional models of working. Only 9% of organisations are open to workplace flexibility, which is a shocking figure when you consider how many years flexible working options have been with us.

It is possible that low scorers are suffering from lack of capital to invest on the infrastructure needed for remote working. But this could be just as easily down to mindset.

The way forward

Workers today want more options when it comes to where and when they work. Many successful companies, for example, attract people because they offer flexibility, allowing employees to work wherever and whenever they feel they can be most productive. This requires some investment, because you need the infrastructure (including a secure online network) to facilitate remote working.

When you put in place the technology and initiatives to enable remote working, your company will reap the dividends. The above also applies to learning and development (L&D).

Today, e-learning and blended learning make personal development more convenient and often deliver impressive results. Talk to your L&D team or training provider to discuss how you can incorporate these training initiatives.

Furthermore, the rise of the independent workforce and so-called 'gig' economy gives management more options. However, to make this work, you may need a complete re-think of your company structure to make it more lean, dynamic and collaborative.



“ It is all very traditional and political – our biggest issue right now is finding talent and staff to help us reach the future. This is the main battlefield. ”



5

Remote collaboration and communication skills cannot be ignored



5

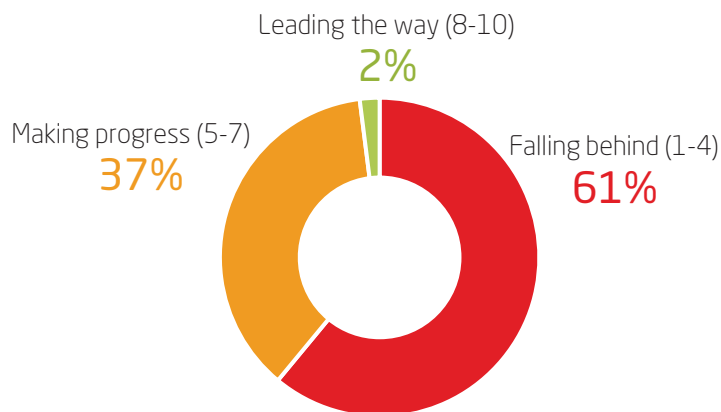
Remote collaboration and communication skills cannot be ignored



Question: How well does your company organise and manage remote collaboration and communication?

Score

Response % (1= not committed at all; 10= 100% committed)



Top performers:



INDIA



PHILIPPINES

Low scorers:



CHINA



VIETNAM

What does this mean?

Most respondents say that remote collaboration, and the communication needed to effectively achieve it, is either not happening or is poorly managed. This naturally follows from the lack of flexibility outlined in the response to Question 4.

In today's competitive global market, remote collaboration is becoming more commonplace, and organisations that embrace it will be the winners.

According to recent Cegos research, Generation Z (those born after the mid-1990s), are enthusiastic about peer-to-peer collaboration and want to use technology to enable good communications and efficient working.

India and the Philippines – two markets that have specialised in outsourced services for many years – are doing well here. They clearly have the experience and expertise to fit more neatly into an environment that is new to many. But the seriously high 'falling behind' figure shows that other markets should follow suit, and quickly. China and Vietnam (having performed well in other measures) seem to be less inclusive and collaborative, which could prove an issue as globalisation advances.

The way forward

Establish a clear plan for enabling remote collaboration amongst teams and with associates. Research the right tools for your purposes, then design and deliver clear communications to make sure collaborations work effectively.

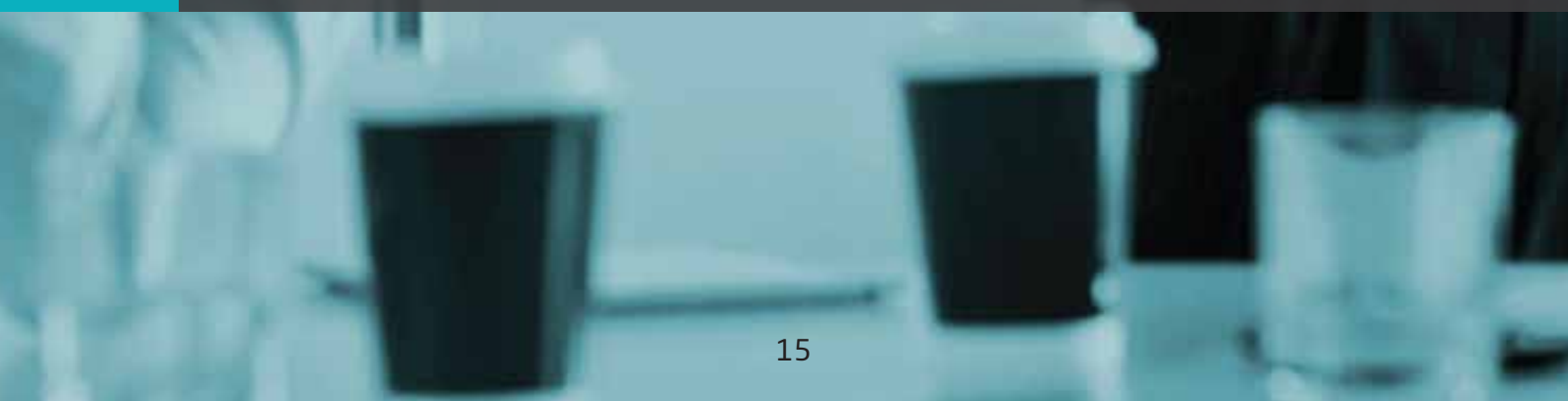


“ Our leaders pride themselves on a more inclusive environment and the management tasked with deploying the strategy are totally aligned...this is all about communicating a clear vision and purpose and then having a plan to execute it. ”



6

There is an urgent need to refocus training on the future of work



6

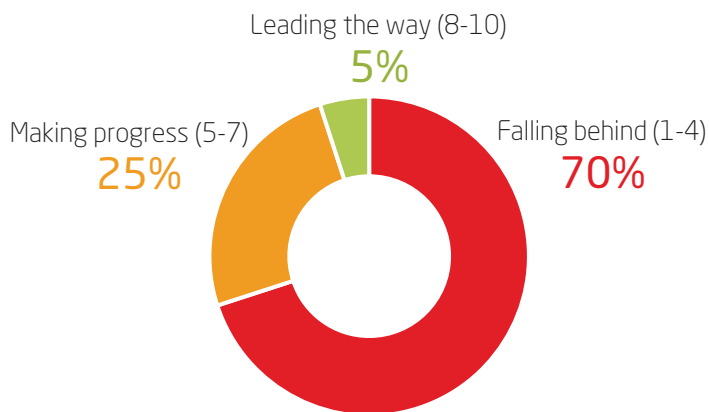
There is an urgent need to refocus training on the future of work



Question: How much of your training is specifically focused on the impact of disruption in your industry and the new workplace knowledge / skills required to deal with it?

Score

Response % (1= not committed at all; 10= 100% committed)



Top performers:



VIETNAM



CHINA

Low scorers:



INDONESIA



MALAYSIA



THAILAND

What does this mean?

Training is a crucial element in any change strategy, especially as the technology landscape is constantly shifting and developing.

A scarily high percentage of companies are introducing change without providing adequate training or development opportunities. This will only result in crash and burn as managers and teams, armed only with yesterday's knowledge and skills instead of those that prepare them for tomorrow, struggle to compete.

Key skills for the future include: the ability to work remotely, peer-to-peer collaboration, the use of internal and external communications technologies, social marketing and managing an independent workforce.

Again, organisations in Indonesia, Malaysia and Thailand are falling behind and risk being run out of business unless they act fast to upskill their people.

The way forward

Learning and development must be valued within the business and form an integral part of any strategic plan. Companies should invest more in their L&D to ensure training provision meets the needs of today and the future.

If necessary, consult a professional and experienced training provider who is familiar with the skills and knowledge your people need. Avoid introducing any change initiatives without the necessary training programme to back them up.



“It's new managers who are not being trained. They aren't ready for the role or the future.”



7

Change is crucial for the
future health of your
business

7

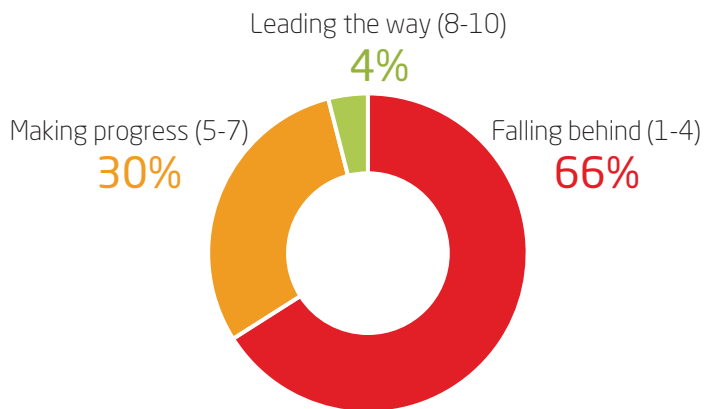
Change is crucial for the future health of your business



Question: How ready is your organisation to implement new ways of working that change the way things are done today and protect the future health of the business?

Score

Response % (1= not committed at all; 10= 100% committed)



Top performers:



AUSTRALIA



SINGAPORE



INDIA

Low scorers:



THAILAND



MALAYSIA



INDONESIA

What does this mean?

A shocking majority of Asia Pacific businesses are focused too much on today instead of initiatives needed for the future. Clearly, companies are not adapting well or are failing to plan for industry disruption.

With only 34% of respondents saying their companies are making any progress here, leaders and managers should be shaken into action and start thinking 5 or even 10 years ahead. Once they have a clear future vision, they should account for it in their budgets and strategic planning.

The way forward

Research what the futurists in your industry are saying, and keep one eye on what your most successful competitors are doing. Think specifically about the type of skills your organisation is likely to need in the future and invest in training people up now, so that they are fully prepared when the time comes.

If you mix forward thinking with an innovation culture, you are on a strong path to success. After all, your competitors – including the startups – are already doing it.

Having a mindset open to innovation and change will ultimately transform your business into one that is agile and fit for the future. Managers currently falling behind in this respect should take urgent action to change.



“ It starts at leader level, but the rest of our company is frustrated at the lack of clear direction and change. In fact, our results are suffering and we are turning the blame inwards. Not a great atmosphere and our leadership should know better. The future is not on our radar – we have too many short-term issues to handle. ”



8

The biggest challenges of business transformation

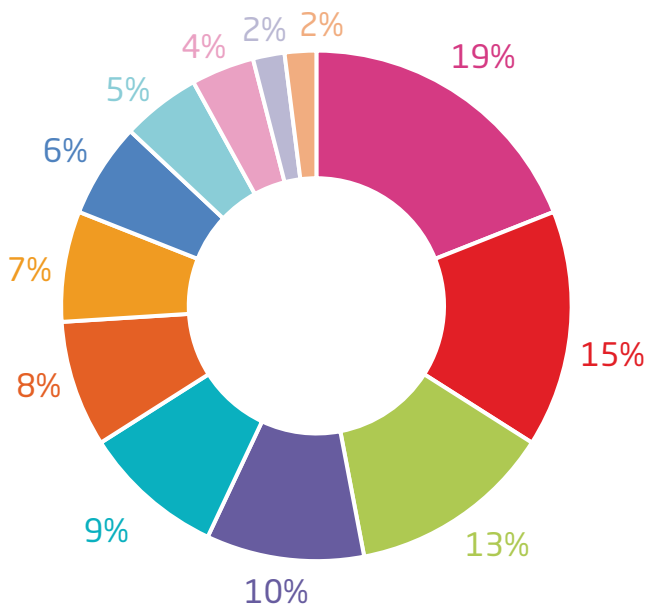
8

The biggest challenges of business transformation



Question: What are the three biggest challenges you face in transforming your company into a business that is ready to succeed in the future?

In order of importance



- Management commitment
- Clarity of direction and action
- Mindset/culture
- Leadership motivation and skills

- Risk aversion
- Knowledge
- New skills development
- We don't know what we don't know

- Keeping up with advances in digital technology
- Money
- Time
- Incompetence at top level

What does this mean?

The top four challenges are all related to senior management in one way or another, and many of the issues raised are addressed by other responses to the survey.

Nearly 20% of people placed 'management commitment' at the top of their list. This suggests leaders and managers across the region must prove they are invested in the future, open to new ways of working and seek to give people the full support they need to do their jobs well.

The way forward

Leaders and managers should examine the mindset and culture of their company, drawing honest and challenging feedback from the people within it. They should then take steps to improve the culture, making it more open, inclusive and willing to take on new ideas.

They should also incorporate an element of risk to keep the company fresh and competitive.

Finally, managers must provide clarity about the direction the company is heading through a series of clear and engaging communications.



“ My organisation is so far behind and I think will be in shock in 2 years – the leader won't listen and he is like an 'emperor'. What do we do in these situations? ”

Further Guidance

Cegos regularly provides free guidance and support for businesses in our blog (<http://www.cegos.com.sg/insights/tag/blog/>). Here is a selection to inspire you on the way to brave new ways of working.



4 skills that keep your company competitive

<http://bit.ly/2HKUITF>



How to digitise your learning programmes

<http://bit.ly/2DdiGE6>



Ready your business for the tech-savvy, experience-hungry generation

<http://bit.ly/2p2Espb>



5 ways to get your people enthused about change

<http://bit.ly/2Fo6EgZ>



Why you need an innovation mindset

<http://bit.ly/2oTtaUY>



How to sell your strategy

<http://bit.ly/2FsSSpo>

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About the author: Jeremy Blain

Jeremy Blain is a business leader, futurist, intrapreneur, new-era learning professional, author and conference speaker.

As managing partner at Cegos Group – one of the world's leading professional skills training organisations – he is currently engaged as regional managing director for the Asia Pacific region. www.cegos.com.sg Before this, he was managing director of Cegos U.K.

Jeremy is a fellow of The Institute of Directors UK (FIoD), and holds a Masters of Management in International Business from the Australian Institute of Business as well as a BA (hons) from Sheffield University (UK).

A commercially minded, award-winning L&D entrepreneur, he has 17 years' industry experience and was responsible for Cegos' international expansion strategy through a global distribution partners network. In previous roles at *Procter and Gamble* and *PepsiCo*, and as managing partner of his own point-of-sale software business, Jeremy's responsibilities have included marketing, sales and general management.

Jeremy frequently speaks at international conferences and is a media commentator on topics related to the global L&D market. Themes include: leadership and management challenges for global organisations as they head to the next workplace shift in the 2020s; the integration of emerging and informal learning technologies; the importance of performance measurement and proving ROI; developing 'core' commercial skills to achieve competitive business advantage...and more.

Thanks to his work in the transformation of learning in the digital era, Jeremy has been recognised by Stanford *Who's Who* since 2013, who state that "*Jeremy has consistently demonstrated the dedication, vision and skills required to be considered among the best.*"

For more details, debate or discussion, you can find Jeremy on LinkedIn <http://sg.linkedin.com/in/jeremyblain> and on Twitter at <http://twitter.com/learntheplanet>

Jeremy has also published a series of white papers on issues relevant to L&D. <http://www.slideshare.net/JeremyBlain>

About Cegos Group

Cegos – Europe’s largest training organisation – is one of the major international players across the Asia Pacific region, based at its regional HQ in Singapore, with operations in China and Hong Kong.

With access to a network of valued region-wide, Cegos supports client learning and development anywhere, in any language, consistently and with a truly “Think Global, Learn Local” approach.

Our focus is on developing managers and their teams through a comprehensive suite of smart skills, targeted at organisational level and other functions such as sales and marketing. Importantly, Cegos offers personalised, individual learning solutions.

Since its inception in 2012, *Cegos Asia Pacific* has grown from strength to strength, picking up recognition and industry awards along the way, demonstrating credibility and differentiation to our clients in a very crowded marketplace. It also illustrates how we are constantly innovating and challenging our own industry, bringing learning provision in line with the demands of the future of work, digital disruption and all the other challenges we face today.



As a result of investment and industry leadership, Cegos provides a multi-mode approach to training and development. We use a variety of delivery methods ranging from face-to-face training to blended learning and digital programmes, including on-the-job coaching apps.

The Cegos Group was founded in 1926 in France and is one of the world leaders in professional training for multinational organisations, developing over 250,000 managers internationally each year, with a turnover of over \$220 Million USD per annum.

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**Global
Learning**
BYCEGOS®

**e-Learning
SOLUTIONS**
BYCEGOS®

**CEGOS
Discovery**

Choosing Cegos - What makes us different from other training and development providers?



Learning that works

With nearly 100 years of experience to draw from, the experts at Cegos know how people learn. As such, we design and deliver programmes that make learning happen fast. Cegos is recognised for innovation at industry level – both globally and regionally in the Asia Pacific – and offers creative learning that works in a world of rapid change.



Preparing for the future of work, today

Our training equips teams for the future demands of business. Cegos continually invests in new content, learning methods and learning communities to ensure our training is relevant for today. This makes us the perfect partner for forward-thinking clients who seek something unique in their learning provision.



Think global, learn local

Cegos has access to a huge global network, so we can support our client's training needs wherever they are on the planet, whenever they need it. Our programmes can be multi-lingual and multi-cultural, allowing us to deliver a true multi-national rollout – we are one of the few companies to transcend borders while retaining a uniquely local touch in all our international markets.



Engaging and interactive training

We use cutting-edge learning techniques and tools, backed up by the latest developments in neuroscience, to guarantee learners are engaged in the most effective way possible. Cegos invests in digital technology to inspire the learning journey with creative content across a range of platforms; from the latest VR tools to mobile. Nonetheless, in a world of digital disruption, we understand the value of the human touch as an integral part of how learners learn today.



Results that mean business

We create truly personalised learning solutions that work for learners and teams at organisation level. Using the '70-20-10' learning model, our training programmes are perfectly blended to be measured for impact from day one, rather than relying on post-learning evaluation. Growing people to grow the business is at the heart of what we do.

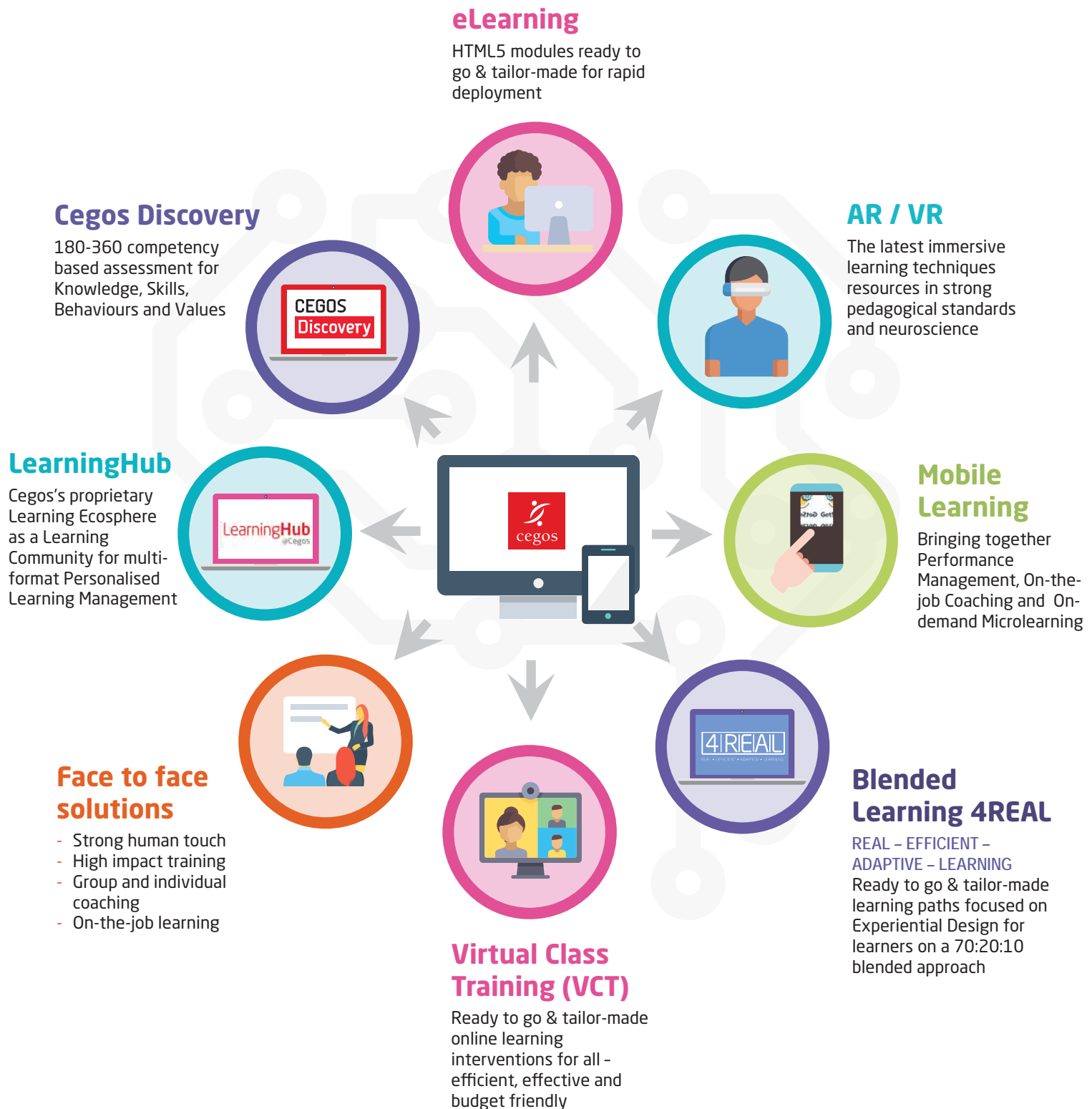


A true knowledge leader

Cegos regularly invests in research and new thinking. We are one of the few smart-skills training providers in the Asia Pacific region who create industry white papers that lead directly to action. Our publications feature pioneering research on topics such as the future of work, the transformation of learning in the digital era and management capability. These inform strategy and operational plans to help our clients win and remain competitive in today's market place.

Award winning solutions from Cegos

Locally, Regionally and Globally





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BEYOND KNOWLEDGE*

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