

# **TELCO'S & THE CHANGING NATURE OF WORK**

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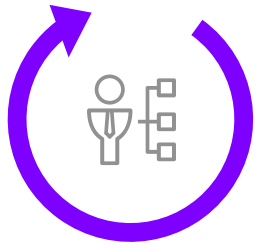
**Athens, November 21, 2018**



**accenture**

# FORCES OF CHANGE

THERE ARE A NUMBER OF FORCES OF CHANGE SHAPING THE FUTURE WORKFORCE



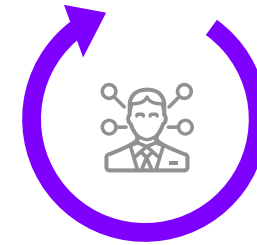
## THE 100 YEAR LIFE

The lines between education/work/retirement are becoming blurred



## AI REDEFINING WORK

Organizations need to upskill their workforce at scale, at speed and continuously



## PEOPLE + CULTURE = DIGITAL

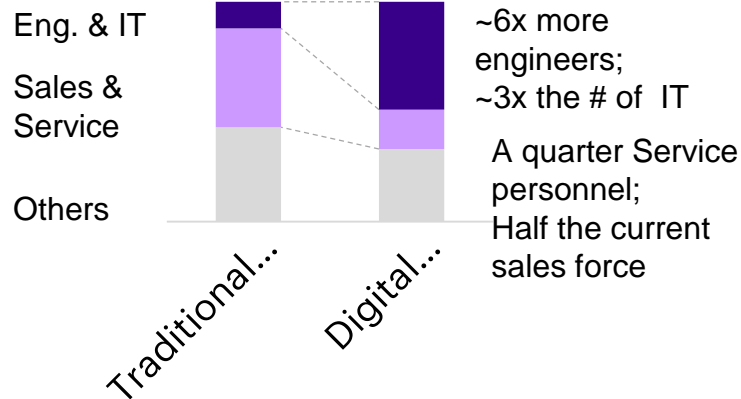
Digital transformation is really a people and culture transformation at its core

# CSP'S ARE REQUIRED TO REWRITE THEIR OPERATING MODELS

## NEW WORKFORCE & WAYS OF WORKING

### DOUBLING-DOWN ON ENG & TECH

#### Workforce mix



Competing against digital disruptors means accelerating the shift to **'a new workforce'** which is focused on the areas that create future value for telcos

## BREAKING FUNCTIONAL ORGANIZATION

### BREAK VERTICAL P&L'S

#### Product-centric



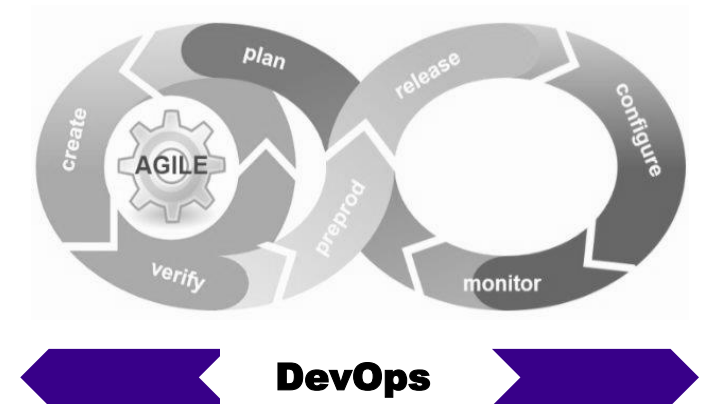
#### Customer capability-centric



Re-orient traditional structures optimized to drive product profitability to focus on cross-platform, customer-centric teams, focused on driving **Reach**

## AGILE & DEVOPS ADOPTION

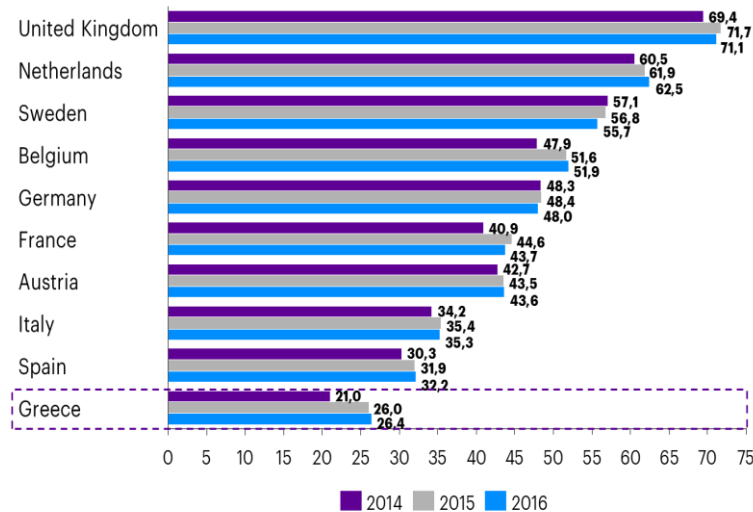
### DRIVE FLEXIBILITY & SPEED-TO-MARKET



Expand usage of **Agile**, to optimize TTM and enhance business agility; **DevOps** to increase velocity, fundamentally changing collaboration between business and IT as well as with 3<sup>rd</sup> parties

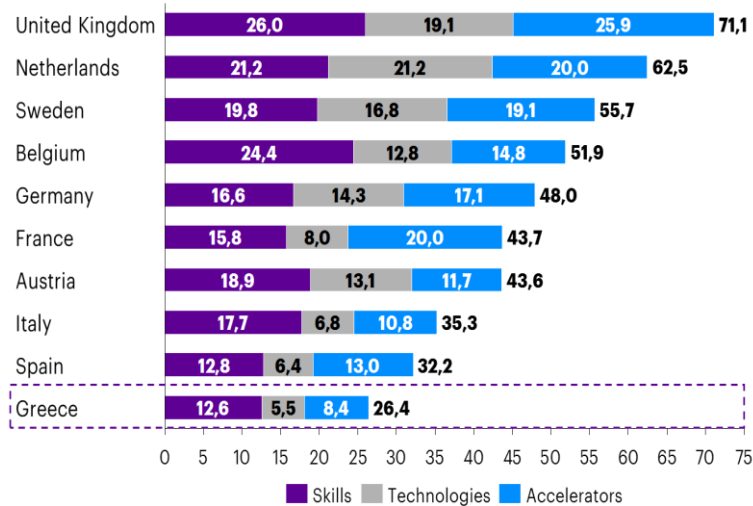
# THE CENTRALITY OF DIGITAL SKILLS CANNOT BE UNDERESTIMATED FOR CSP'S

## COMMUNICATIONS INDUSTRY - DIGITAL ECONOMIC OPPORTUNITY INDEX



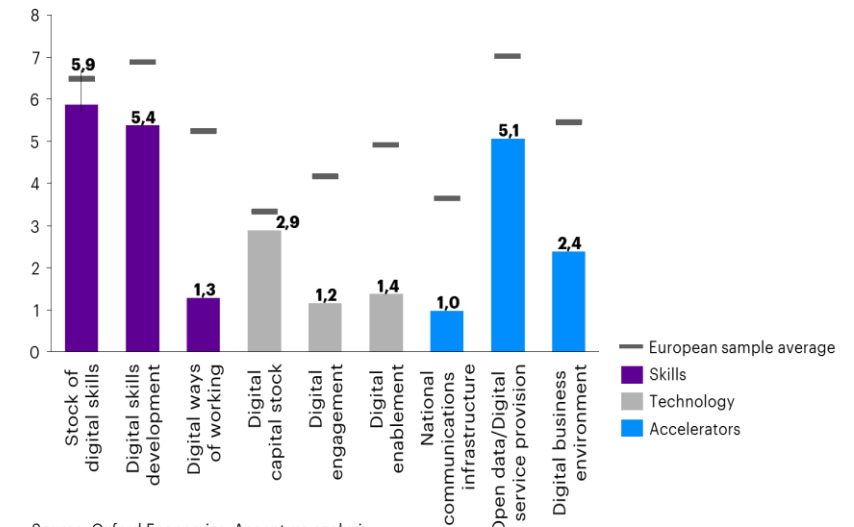
Source: Oxford Economics, Accenture analysis

## COMMUNICATIONS INDUSTRY - DIGITAL ECONOMIC OPPORTUNITY SCORES BY COUNTRY



Source: Oxford Economics, Accenture analysis

## THE GREEK COMMUNICATIONS INDUSTRY - DIGITAL ECONOMIC OPPORTUNITY INDEX COMPONENTS



Source: Oxford Economics, Accenture analysis

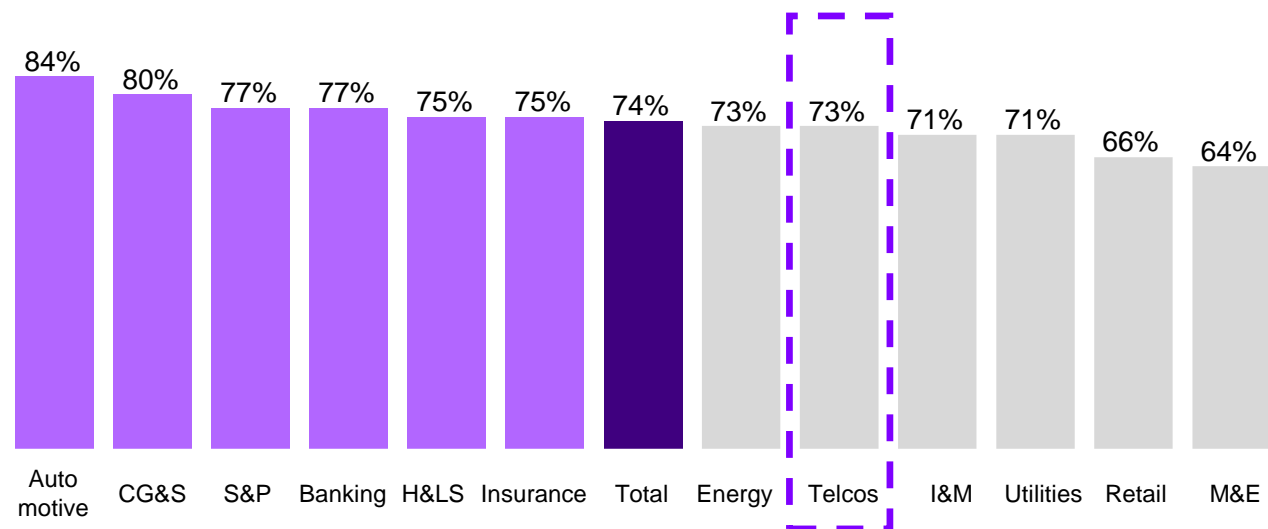
Source: <https://www.slideshare.net/accenture/digital-greece-the-path-to-growth>

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# AI IS REAL AND AUTOMATION IS ACCELERATING, WHICH MIGHT SUGGEST THAT MORE JOBS WILL DISAPPEAR IN THE NEXT THREE YEARS

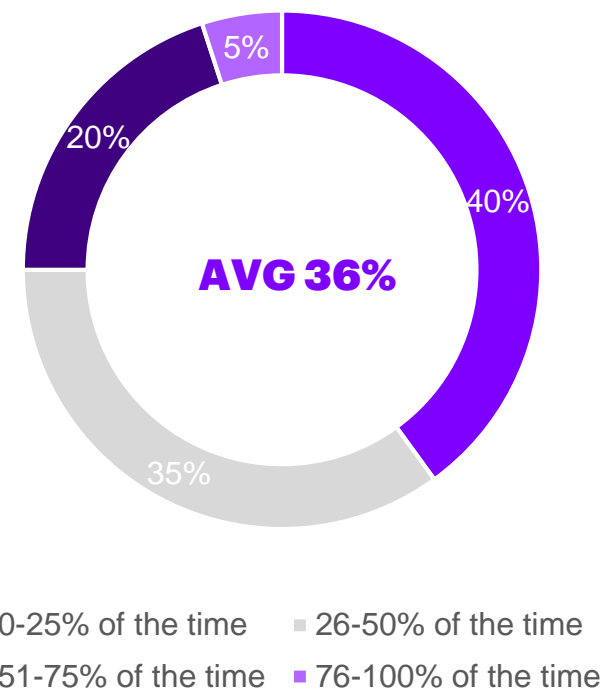
**TO WHAT EXTENT WILL YOUR ORGANIZATION AUTOMATE TASKS AND PROCESSES IN THE NEXT 3 YEARS?**

**Top 2 aggregated responses—"to a large extent" and "to a very large extent"**



Q25 | Base: CXOs Total Sample | N=1201

**TO WHAT EXTENT ARE YOU REQUIRED TO WORK WITH INTELLIGENT TECHNOLOGIES?**

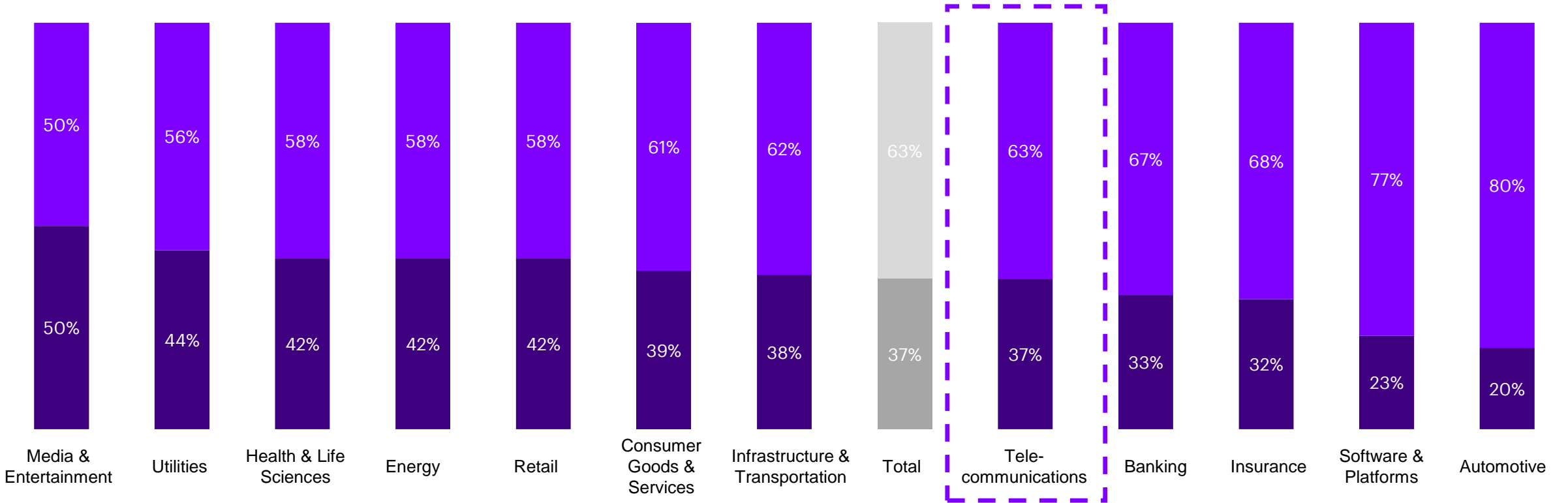


Q22 | Base: Workers Total Sample Telco | N=865

# BUT A MAJORITY OF CXOS ACTUALLY EXPECT NET JOB GAINS FROM INTELLIGENT TECHNOLOGIES IN THEIR COMPANIES OVER THE NEXT THREE YEARS

## WHICH OF THE FOLLOWING STATEMENTS DO YOU AGREE WITH MORE?

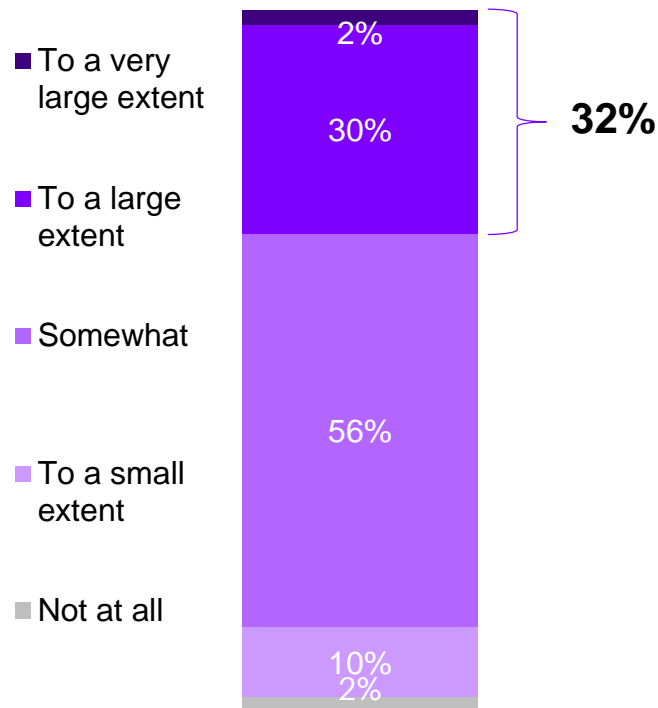
- We expect intelligent technologies will result in a net gain in jobs for our company in the next 3 years.
- We expect intelligent technologies will reduce the size of our workforce in the next 3 years.



Q29 | Base: CXOs Total Sample | N=1201

# TELCO CXO'S RECOGNIZE THE RECONFIGURATION OF EXISTING JOBS AND AGREE THAT COMPANIES NEED TO TAKE ACTION NOW

## TO WHAT EXTENT HAVE YOU REDESIGNED JOBS WITHIN YOUR ORGANIZATION?



Q46 | Base: CXOs Total Sample Telco | N=100

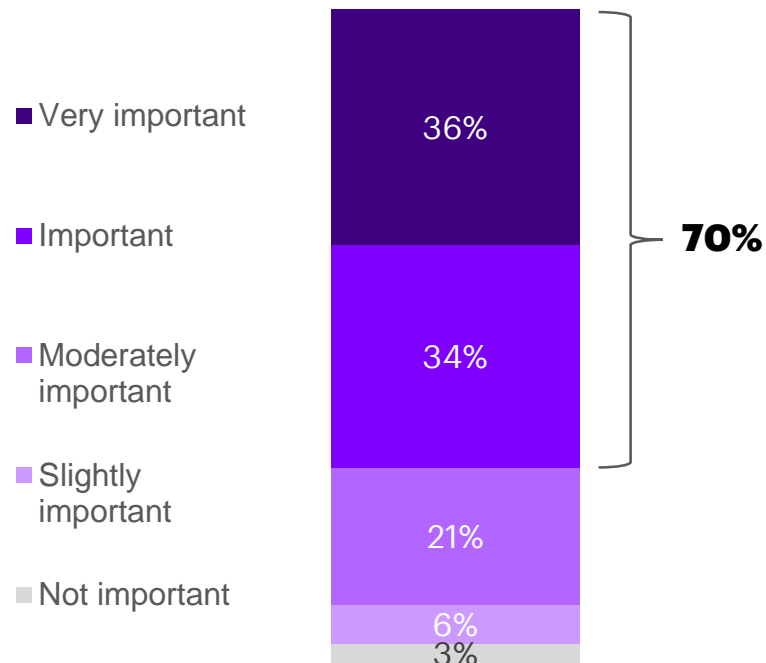
## THE TOP 3 INITIATIVES CXOS ARE TAKING TO PREPARE THEIR WORKFORCE TO WORK MORE EFFECTIVELY WITH AI



Q36 | Base: CXOs Total Sample Telco | N=100

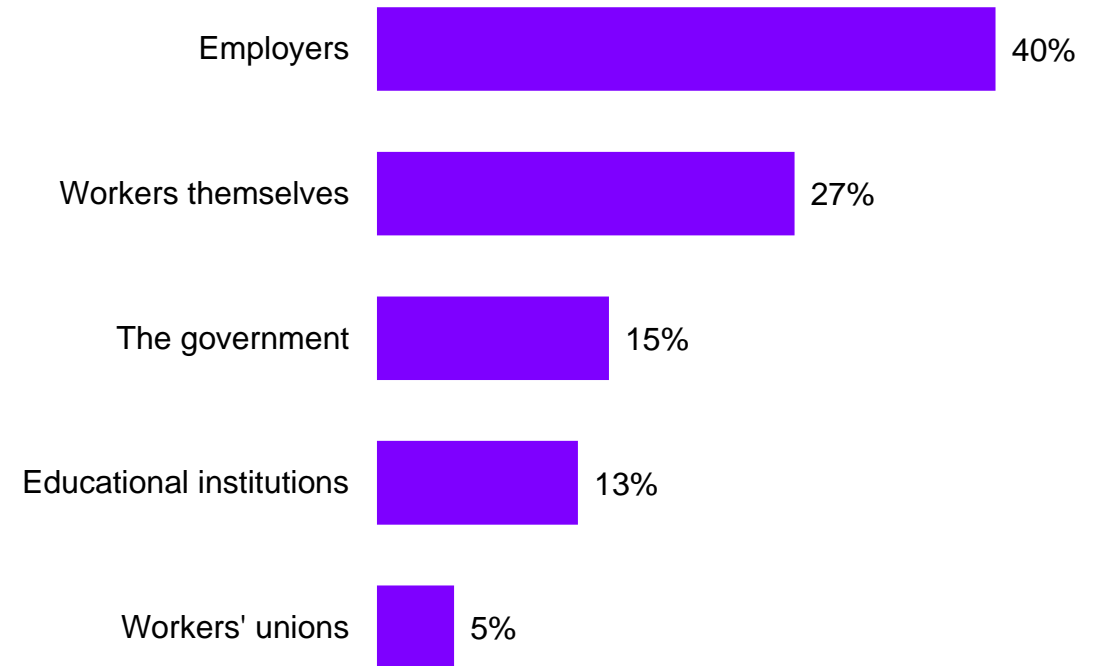
# EQUALLY, WORKERS ARE EAGER TO DEVELOP SKILLS AND TO INVEST IN THEMSELVES - BUT EXPECT EMPLOYER SUPPORT, TOO

**DEVELOP YOUR SKILLS TO BE ABLE TO WORK WITH INTELLIGENT MACHINES IN THE NEXT 3-5 YEARS?**



Q26 | Base: Workers Total Sample Telco | N=865

**RESPONSIBLE FOR ENSURING WORKERS' SKILLS STAY RELEVANT?**

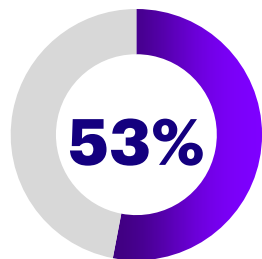


Q28 | Base: Workers Total Sample Telco | N=865



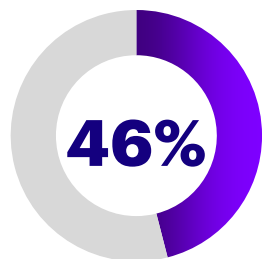
# CSP EXECUTIVES EXPECT THAT THE WORKFORCE OF THE FUTURE WILL BE A BLEND OF HUMANS AND MACHINES

IN THE NEXT 3 YEARS, CXOS EXPECT TO...



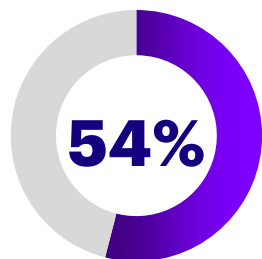
53% of CXOs believe that **AI will be used to a large extent to assist in tasks** in their organizations in the next 3 years

Q25b | Base: CXOs Total Sample Telco | N=100



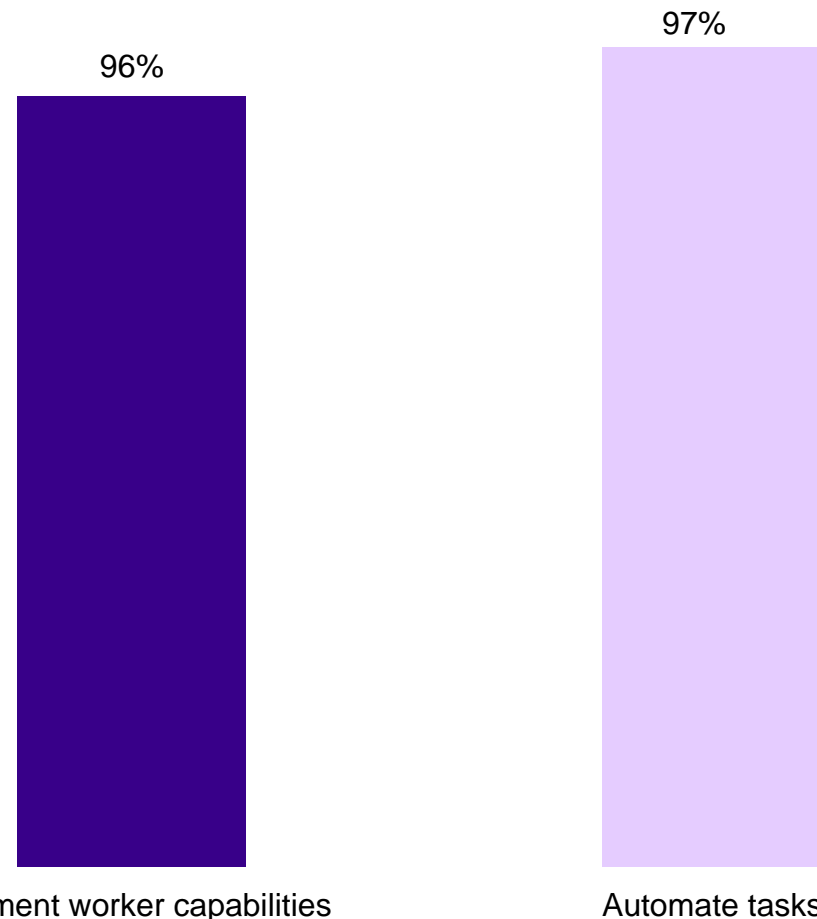
46% of CXOs believe **human-machine collaboration is important** to achieve their strategic priorities

Q30 | Base: CXOs Total Sample Telco | N=100



54% of CXOs expect the **share of roles requiring collaboration with AI to increase** in the next 3 years

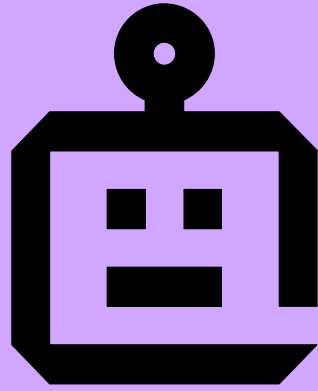
Q32 | Base: CXOs Total Sample Telco | N=100



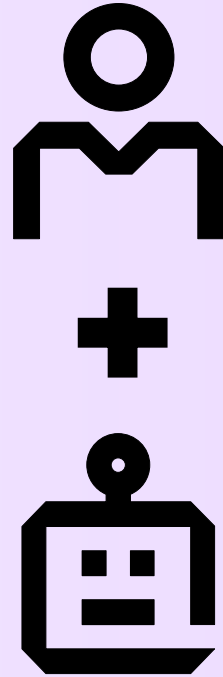
Q26b | Base: CXOs Total Sample Telco | N=100

Q25b | Base: CXOs Total Sample Telco | N=100

# HUMANS AND MACHINES CAN SEAMLESSLY COLLABORATE IN THE “MISSING MIDDLE”



**MACHINE  
-ONLY  
ACTIVITY**



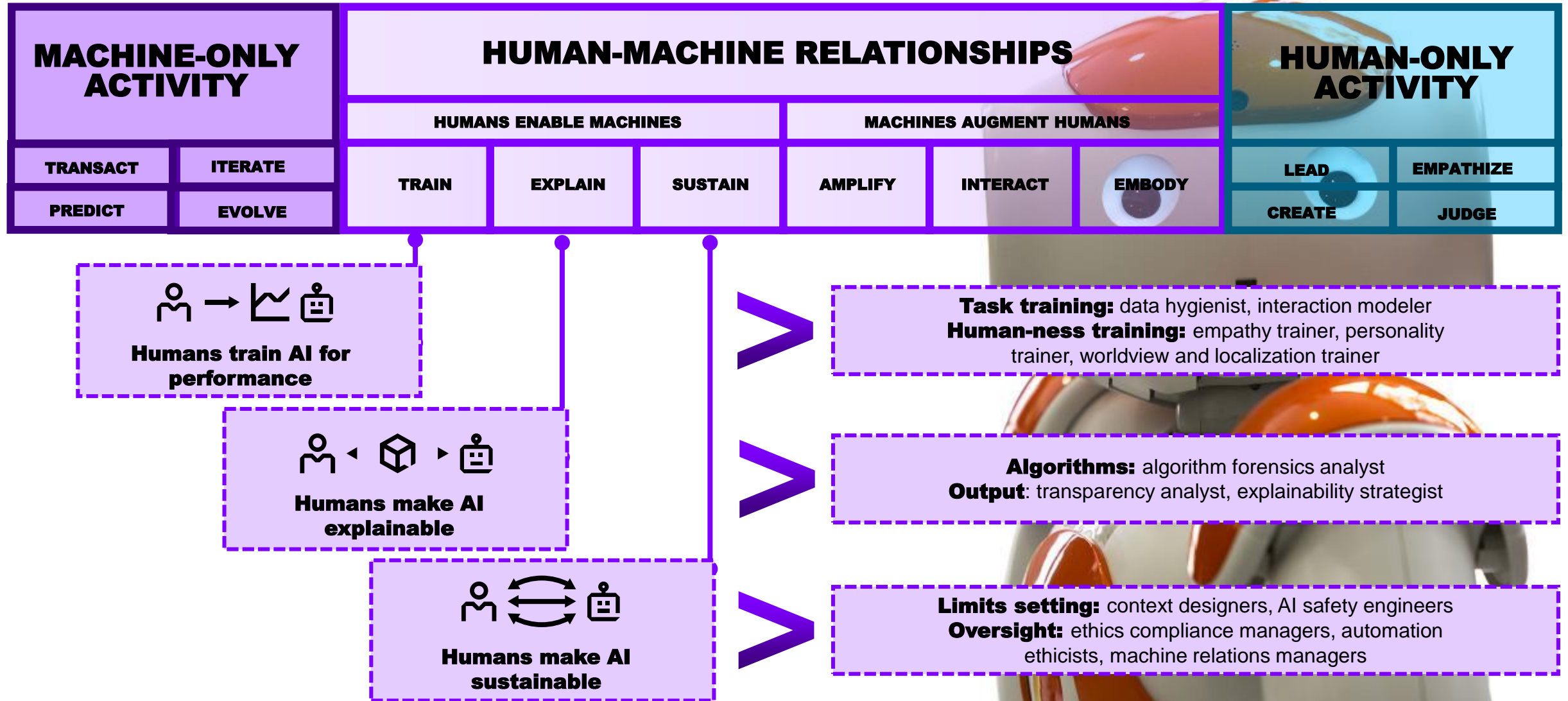
**HUMAN-MACHINE  
RELATIONSHIPS**



**HUMAN  
-ONLY  
ACTIVITY**

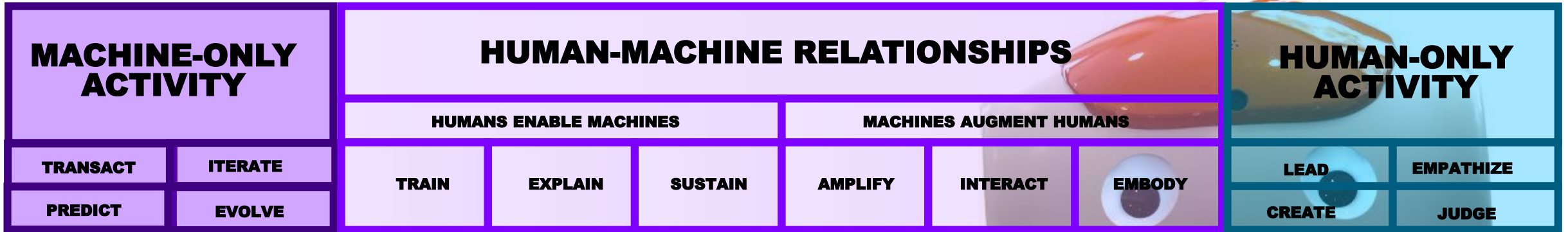
Source: “Human + Machine: Reimagining Work in the Age of AI”, by Paul R. Daugherty & H. James Wilson

# IN THE “MISSING MIDDLE” HUMANS CAN ENABLE MACHINES...



Source: “Human + Machine: Reimagining Work in the Age of AI”, by Paul R. Daugherty & H. James Wilson


# ... WHILST MACHINES CAN HELP “AUGMENT” HUMANS



Delivering via drones, remote mining, manufacturing customized automobiles

Guiding customers through a process, humanoid robots answering questions

Selecting the right tools for diagnoses, designing furniture, maintaining industrial equipment

  
Machines embody physical aid

  
Machines give UI personality

  
Machines augment with powerful insight

Source: “Human + Machine: Reimagining Work in the Age of AI”, by Paul R. Daugherty & H. James Wilson

# CALL TO ACTION

## PRIORITIES FOR LEADERS

### REIMAGINE WORK

**Shift from workforce  
planning to work planning**



### PIVOT THE WORKFORCE

**to areas that unlock  
new forms of value**



### SCALE UP NEW SKILLING

**to work with  
intelligent machines**



# REIMAGINE WORK

Shift from workforce  
planning to work  
planning



CEOs must escape the debate about AI's impact on jobs. The real issue is the need to reconfigure work.

## Assess tasks – not jobs

Allocate work to **machines** and **people**, balancing the need for automation and augmentation.

## Create new job descriptions

Free people from functional roles and build **project** based teams.

## Map skills to jobs

Assess internal capabilities to new roles. Then **reskill** and source new talent.

# PIVOT THE WORKFORCE

to areas that unlock  
new forms of value



## **Align the workforce to new business models**

Orientate it to support new  
customer experiences.

## **Make the business case**

Use automation to fuel growth by  
reinvesting savings in the  
workforce.

## **Organize for agility**

Create flexible processes;  
create the structures that  
support the assembly and  
disassembly of teams.

## **Foster new leadership DNA**

Create leaders at all levels in more  
autonomous working  
environments.

# SCALE UP NEW SKILLING

to work with  
intelligent machines



## **Prioritize skills for development**

Strike the balance  
between technical,  
judgement, and social  
skills.

## **Target ‘new skilling’**

Assess different  
levels of skills and  
willingness to learn.  
Cater to these  
different levels.

## **Go digital**

Use VR and AR to  
accelerate the speed  
and scale of effective  
training. Deploy  
digital learning  
boards to  
democratize training.

**“Our customers expectations are changing. They want simpler, faster, frictionless experiences. We are constantly evolving our use of technology to empower our associates and provide them with new skills at a rapid scale to better serve our customers.”**

**JACQUI CANNEY, Executive Vice President of Global People for Walmart**



# THANK YOU!