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INNOVATION
LEADER

About This Project

Mariners are used to moments of dramatic change, when a sudden atmospheric shift turns a clear day foggy. What had been a miles-long view to the horizon is suddenly constrained to the deck around them. Experience, alertness, and the ability to make quick decisions become paramount.

2020 has felt, for senior leaders, like exactly that sort of situation. As Scott Price, the President of UPS International, put it, "I didn't live through the Spanish flu, but 1918 was the last time the global economy was disrupted to this level. And it has disrupted everyone."

Amidst such disruption, how should C-level leaders be planning for the future and supporting innovation? With so many priorities demanding their immediate attention, how should they make space to think about the medium- and long-term?

In April 2020, we began planning this research initiative, CxOs & Innovation. The objective was simple: to be helpful to C-level leaders and those professionals responsible for driving innovation inside large organizations. A first mini-report, released in August, focused on the changing role of the innovation leader in large organizations. This mini-report focuses on the ties between those innovation leaders and the C-suite, and how C-suite executives can create a strong vision for innovation—and provide it with appropriate resources and focus—coming out of the current crisis.
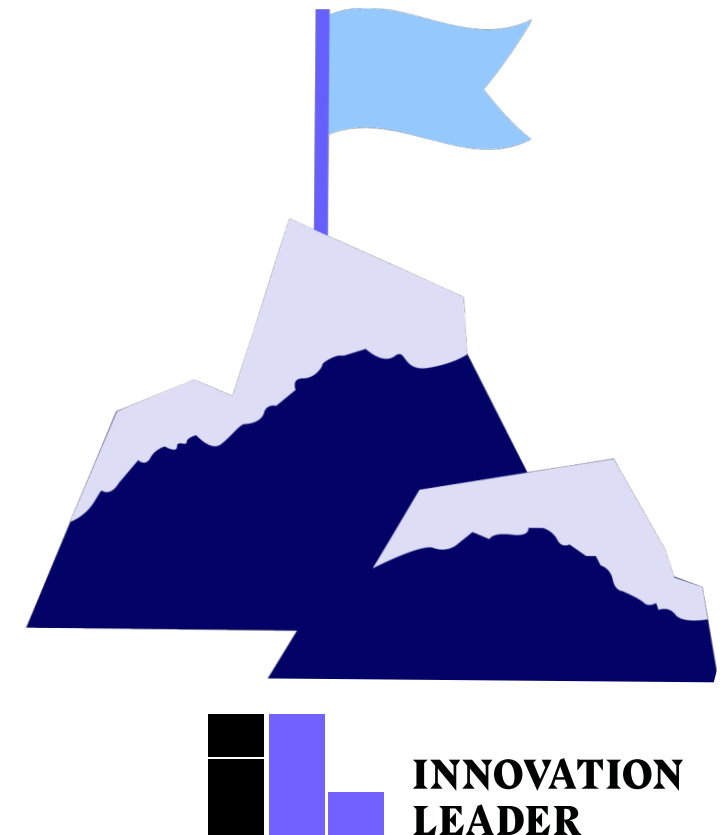
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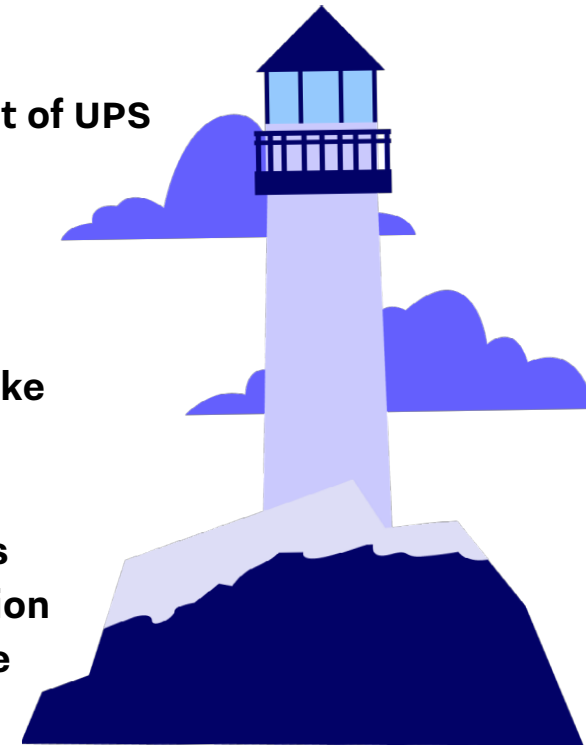
Executive Summary

This mini-report includes data from a survey fielded in September 2020 and a set of qualitative interviews conducted in the same timeframe. We received 211 qualified survey responses, largely from North America (62 percent), at the director level and above (74 percent), and from companies with more than $1 billion in annual revenue (59 percent).

Innovation budgets have taken a hit in 2020 (27 percent have decreased, three times what we found in our 2019 survey), but there's optimism about 2021 (41 percent expect an increase in investment, though 19 percent expect a decrease).

Encouragingly, we found that quality of alignment between the innovation and R&D groups in large companies and the C-level leaders who oversee them has been either improving (40 percent) or staying the same (45.5 percent of respondents) in 2020. Just three percent said alignment had gotten "much worse" this year.

The three tech themes of greatest interest to our survey respondents were collaboration tools, cloud infrastructure, and emerging mobile technologies. The three of lowest interest? Blockchain, augmented reality, and quantum computing.

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Despite 2020's unprecedented convergence of challenges (and unprecedented use of the word "unprecedented"), some aspects of corporate innovation have remained stable. In 2019 and 2020, we asked a question about the way that short-term financial expectations impact the organization's ability to invest in innovation. In both years, respondents told us that these short-term expectations had a moderate impact (6.2 on a scale of 0-10 last year, and a slightly elevated 6.4 this year). And when we asked about how much effort and resources are dedicated to incremental, adjacent, and transformational innovation—sometimes called Horizon 1, 2, and 3—the allocation had shifted just slightly from 2019, toward incremental and adjacent work, and away from transformational.

When we asked respondents about the biggest changes they've made in 2020, we heard about staff cuts, spending freezes, and of course, getting accustomed to remote work. One respondent wrote that the "CEO and some executives have buried their heads in the sand due to COVID-19...and don't seem to care or want to worry about the future."

But in many organizations, there is an acknowledgment that downshifting to neutral amidst challenging times is a risky decision. These organizations are adding new roles "to increase our capacity to research and test," focusing on "pilots which can scale quickly for an immediate payback," and providing more employees "with tools and guidance to execute their ideas," according to our survey respondents.

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Huge projects requiring massive investments are getting new scrutiny, for sure, and there's a concerted focus on H1 and H2 initiatives. But C-suite executives in these companies are investing in "innovative digital capabilities," and encouraging R&D and innovation groups to get better at collaborating with colleagues in the business units.

There's a need to create and communicate a clear vision about what projects and programs can deliver growth in 2021 and beyond, what organizational support they need, and what metrics are being tracked. That vision will be different for every company, and the vision will likely be different in December 2020 than it was in December 2019.

Innovation may be easier to invest in when times are good, but Jason Field, CEO of W.L. Gore & Associates, the $3.8 billion material science company, observes that building innovation capabilities in a large organization requires patience and perseverance: "You have to bring that sense of urgency together with that long-term view."

"Downshifting to neutral amidst challenging times is a risky decision."

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Alignment Between Innovation and the C-suite is Improving

One of the surprising findings of this report is that in the vast majority of respondent organizations, alignment between innovation teams and the C-suite has stayed the same (46 percent) or improved (40 percent) amidst the challenges of 2020; fewer than 15 percent of respondents say it is getting worse.

Much of that can be chalked up to what respondents told us was clearer communication about the organization's near-term needs and priorities from the C-suite, a new sense of urgency, and more openness to experimentation.

How has your support and alignment with your senior leadership changed this year?

Category	Percentage
Stayed the same	45.5%
Somewhat better	23.7%
Much better	16.1%
Somewhat worse	11.4%
Much worse	3.3%

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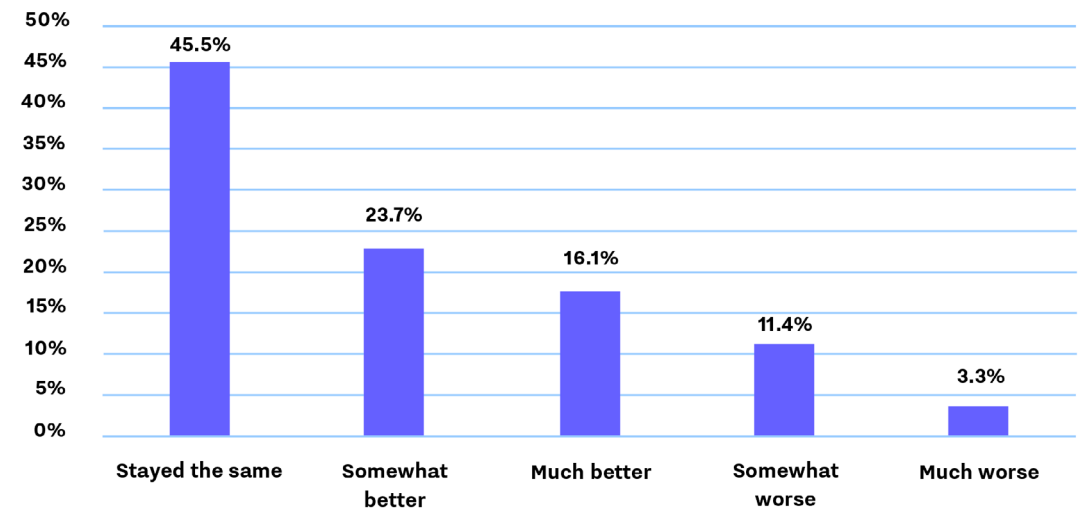
Insights Into Why Alignment is Getting Better (or Worse)

We invited respondents to share additional detail about how support and aligment are changing in their organizations this year. A selection of their responses follow, along with the industry they represent:

Alignment is Improving	Alignment is Staying the Same—or Getting Worse
"More communication, simpler vision." —Consumer Goods & Products	"Less contact." —Higher Education
"CEO was willing to pivot, and put resources towards helping customers and letting employees be flexible to work from home. We redid our budget and set up a contingency fund for 2021." —Technology	"Reporting has changed. Group now moved under EVP who runs business-as-usual. All support (or understanding) of innovation is gone." —Media & Telecom
"I think the CEO is way more open to new perspectives, approaches, and technologies." —Healthcare	"Communication has broken down, with a lot of C-level shifts going on." —Energy & Utilities
"Our team has worked even more closely with our executive sponsor to share how we have changed our focus to support the organization and to better understand the organizational needs during this unique time." —Pharmaceuticals & Life Sciences	"Aging CEO does not understand technology at a level to begin conversations about innovation, and where the organization needs to be five or ten years. Spent $60+ million on core admin systems and [we] still rely mostly on paper with no digital strategy." —Financial Services
"Innovation is seen by more as a necessity, not a nice to have, as we've all had to innovate in EVERYTHING we do." —Nonprofit & NGO	"Project delivery teams have no engagement with the CFO, our group's board-level sponsor." —Automotive Transport & Logistics

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Mark Maybury

Chief Technology Officer

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Stanley Black & Decker

Engaging with the C-suite

"A good C-suite person will always be listening. There are lots of ways to get to them. Don't be afraid to send them an email. If you've got something important to say, tell them. What's interesting is people don't oftentimes realize that executives can get very isolated. There are lots of ways to get to leaders. Try to address their issues, try to engage, and eventually, you'll make a connection."

Don't Follow the Herd

"Stanley Black and Decker has always believed that when you go into a crisis, you go into the crisis strong, maintain strength, and then you come out stronger. It's like the advice Warren Buffett would give you: 'When the entire herd is running in one direction, consider running in the opposite direction.' Why would you do that? Because they're running probably on the basis of fear or some perception. Now, sometimes the herd is right, but oftentimes the herd is wrong."

"There is a tremendous amount of talent available, very high-quality talent. … Everybody wants to join a team that's going somewhere. Nobody wants to join a team that's going down."

"It is an exciting time, [and] we are very grateful to be able to be in a building mode. Because we do know there's a lot of pain out there."

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Innovation Focus Gets Pulled Toward Horizons 1 & 2

"How much effort are you focusing on incremental, adjacent, and transformational work?" It's a question that's difficult (or impossible) to answer precisely, but we've asked it in 2019 and 2020 to get a broad sense for how innovation groups are spending their time.

In 2020, there's a slight uptick in incremental and adjacent work (often called Horizon 1 and Horizon 2), as innovation and R&D teams work to support the needs of the core business—working remotely, instituting social distancing or health checks in physical facilities, or enhancing digital offerings for customers. But transformational, or Horizon 3, projects have not fallen off the table entirely: time dedicated to them is down roughly five percent.

What percentage of your various innovation efforts are focused on the following strategies?
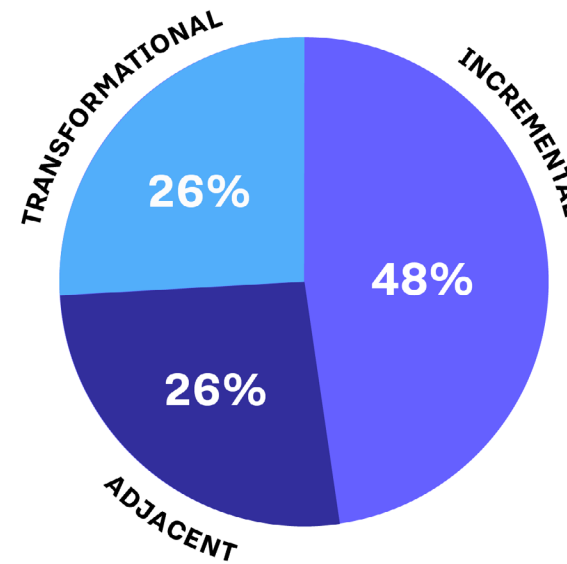
2019
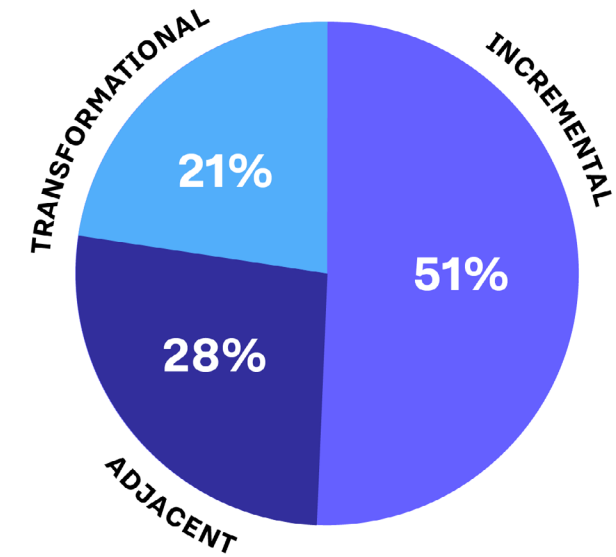
2020

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KPMG Insight: Driving Innovation Success

Kevin Bolen

National Leader, Market Intelligence and Strategic Investments, KPMG LLP

When learning to drive a race car, I quickly discovered there is no partial action—you're either full on the gas or full on the brake, testing the limits of the tires and of yourself. The lessons learned can easily apply to business, where there may be times when it's necessary to move instantly and smoothly from full gas to full brake. And being able to do it well is the secret to success.

Buckle up! In race cars, safety belts serve to keep you secure and in control during violent swings in pace and motion. In business, during periods of disruption and uncertainty that may require the need to aggressively shift your portfolio, consider these guiding principles as your team's safety belts:

1. Get and stay aligned. According to KPMG's Enterprise Reboot report, 57 percent of executives said that COVID-19 had significantly changed their organization's strategic priorities for emerging technologies. While not all pursuits will be tech related, this finding demonstrates how important it is to engage with senior leaders to understand what signals they are reacting to and how they are interpreting them. Then, add your perspectives, challenge theirs, and agree on the highest and best uses for the unique talent and resources on your innovation team. Revisit this often.

2. Remain objective. This is not the time for protracted lobbying to save cool pet projects. According to the responses in this mini-report, innovation budgets have decreased in 2020. When faced with such conditions, you must rapidly and honestly rank each initiative based on its relevance, potential contribution, time needed to complete, and resources required. Brake hard on those at the bottom of the ranking to create the capacity to go full gas on the top ones and add new ones.

3. Look ahead. Don't change course once and let inertia settle back in. When racing, how you exit one turn determines how fast you enter the next one. In business, portfolio decisions made under one set of assumptions need to be retested as the scope and duration of the market changes become clearer.
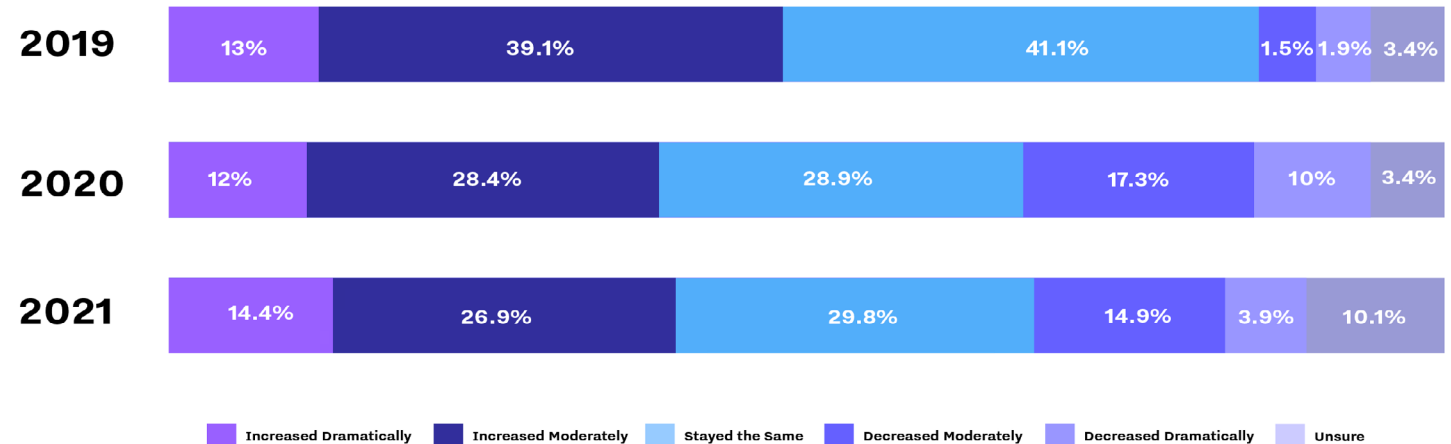
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Innovation Budgets

When we asked a similar group of survey respondents in 2019 about their outlook for budget levels in 2020, more than half (56 percent) said they expected an increase in spending. That number declined when we asked the same question in 2020—but 41 percent of this survey's respondents still said they expect a dramatic or moderate increase in 2021.

Respondents expecting a dramatic budget drop in 2021 roughly doubled, from just under 2 percent last year to nearly 4 percent this year.

How well did last year's respondents do at predicting what would happen to their budgets in 2020? They overestimated (by 16 percent) how likely budgets were to increase, and underestimated (by 11 percent) how likely they were to decrease.

What happened to/is expected to happen to your overall innovation investment in the following year?

Year	Increased Dramatically	Increased Moderately	Stayed the Same	Decreased Moderately	Decreased Dramatically	Unsure
2019	13%	39.1%	41.1%	1.5%	1.9%	3.4%
2020	12%	28.4%	28.9%	17.3%	10%	3.4%
2021	14.4%	26.9%	29.8%	14.9%	3.9%	10.1%

Legend: ■ Increased Dramatically ■ Increased Moderately ■ Stayed the Same ■ Decreased Moderately ■ Decreased Dramatically ■ Unsure

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Tech Priorities: Collaboration & Cloud Infrastructure on Top

Percent Saying a Technology is In Market/Accelerating	
Collaboration Tools/Software	44.5%
Cloud Infrastructure/Services	44.4%
Emerging Mobile Technology Apps	29.1%
Advanced Analytics	27.1%
Robotic Process Automation (Software)	23.4%
Internet of Things/New Sensors	23.2%
AI/Machine Learning	19.3%
Robotic Automation (Hardware)	15.4%
Wearable Devices	11.6%
Speech Interfaces/Virtual Assistants	10.8%
Virtual Reality	8.5%
5G/Other Advanced Wireless Technology	7.6%
Additive Manufacturing/3D Printing	6.2%
Blockchain	5.9%
AR/Mixed Reality	5.6%
Quantum Computing	2%

We invited survey respondents to tell us which technologies they:

• have already in market and are accelerating
• are investing in or pilot testing
• are exploring
• are not exploring or investing in.

Not surprisingly, as every organization shifts to remote work or hybrid work arrangements, collaboration tools and cloud infrastructure topped the list of technologies that our survey respondents are most active in pilot testing, investing in, and deploying. Emerging mobile technologies rounded out the top three, as companies seek to ensure that they have a robust presence on customers' mobile devices.

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Other Tech Priorities

We invited respondents to share additional details about other technologies they're exploring. A selection of their responses follow, along with the industry they represent:

"Internal and external crowdsourcing." —Pharmaceuticals & Life Sciences

"Software as a medical device, digital health (telemedicine, etc.)." —Pharmaceuticals & Life Sciences

"Tissue engineering." —Healthcare

"Electronics miniaturization, more powerful battery technologies." —Medical Devices & Instruments

"Biometric identification, facial recognition technologies, autonomous vehicles." —Automotive, Transport & Logistics
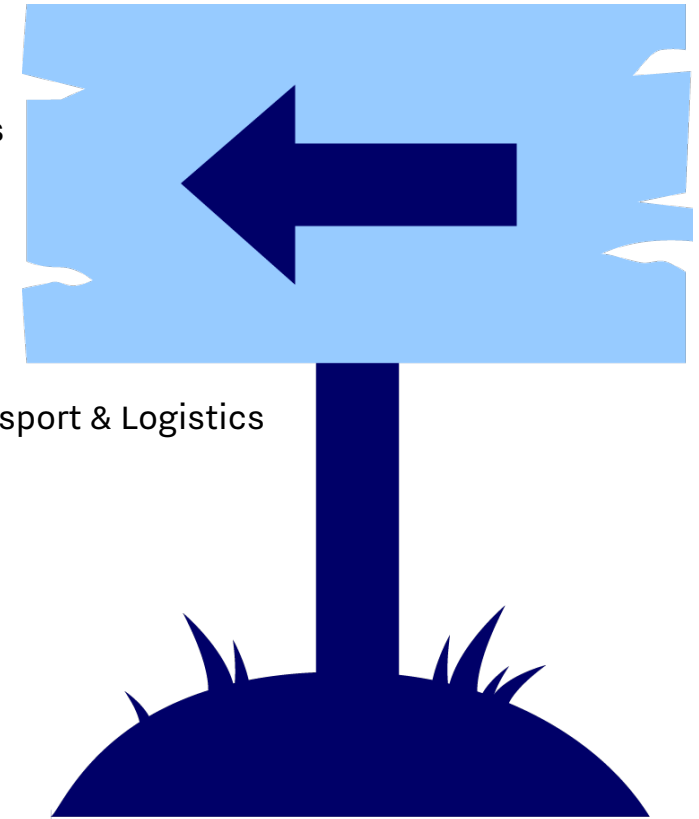
"Biometrics." —Consumer Goods & Products

"Drones." —Nonprofit & NGO

"Building automation." —Energy & Utilities

"Sustainable dyeing and circular/remanufacturing." —Retail

"Water purification and energy generation technologies." —Energy & Utilities

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Scott Price
President, UPS International

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UPS

Transformation Requires Communication

"Transformation, by definition, should strike concern in the hearts of the people involved. Because it's disruptive. If you're going to adapt to agile platforms, it will be disruptive. Communication is important; given the unique culture of UPS, [the message is that] it's not about me [who joined the company as Chief Transformation Officer in 2017], it's about my colleagues who have been here for 30 years… They are the most powerful communicators on the need for disruptive change. I'm the outsider. If I'm running around saying [something needs to happen], it has much less impact than folks who are known. My colleagues all stood up and helped in the process."

No One is Credibly Making Long-Term Plans

"The 1918 Spanish flu epidemic was the last time the global economy was disrupted to this level. When everyone started to shelter in place, we got two weeks to prepare for a Christmas-time volume [of shipping]. We recovered, but this is not like anything we've ever seen before…where the workforce is disrupted, and cities are being shut down. 1918 was the last time we'd seen that."

"No one is credibly doing long-term planning right now. They'll be wrong the minute you write them. For us, we're focused on short- and mid-term. We're very clear on how we're going to invest in the next couple years, because we have demand… But every company has to face liquidity issues. We say that 'cash is queen.' You need to be sure you have the right liquidity to survive this process. You [also] have to be far more oriented toward your customers' needs, and be clear on what your value proposition is. Third, in this environment, you have to think about employees' safety first."

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Moving Forward on Diversity, Equity & Inclusion

In our August 2020 survey, we heard from respondents that advancing diversity, equity, and inclusion was a new priority that had emerged in 2020. In this follow-up survey, we invited respondents to share additional detail about their approach to diversity and equity in their organizations. A selection of their responses follow, along with the industry they represent:

"We have begun reaching out to people with skills/experiences that have nothing to do with the subject matter being investigated. We want divergent ideas/thoughts to spur innovation." —Aerospace & Defense

"We are hiring with [diversity and inclusion] in mind, as well as being self-aware of all that gets in the way. Diversity is about values. Inclusion is about results. Especially in innovation, you can't achieve without including all voices." —Consumers Goods & Products

"Working from home is supporting those folks previously disenfranchised, and leveling the playing field." —Energy & Utilities

"Increased focus on measuring startups we invest in on their D&I." —Venture Capital

"Remote working has put everyone on the same level. Those not in the office are now heard more, because they are not forgotten being on the phone versus the rest of the group in the room." —Forest, Paper & Packaging

"We have hired a new D&I leader so that we can develop a program to realize these positive impacts." —Financial Services

"On-site daycare (not subsidized) has allowed for gender parity." —Consumer Goods & Products
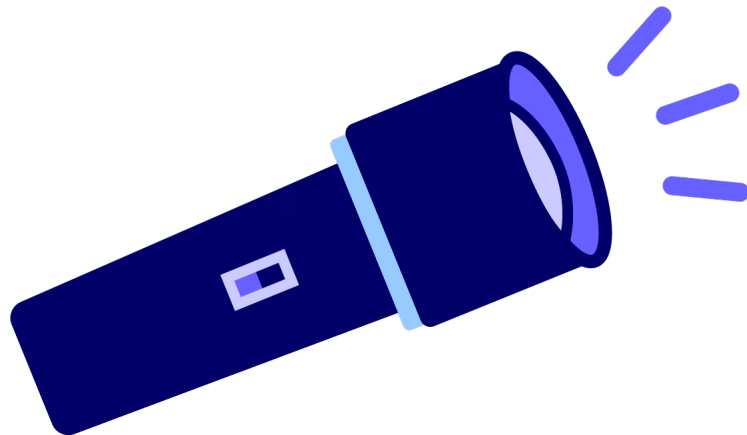
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Moving Forward on Diversity, Equity & Inclusion (continued)

We invited respondents to share additional detail about their approach to diversity and equity in their organizations. A selection of their responses follow, along with the industry they represent:

"We are planning a training about inclusivity in creative and experience design, and will conduct an audit of past work." —Retail

"We are leaning in heavily in this space. However, this is not a focus area that is innovation led, nor should it be. There are other areas of our company that are better positioned to lead this." —Retail

"Yes, we're actively working to build representation in our leadership. There are active training programs for managers and employees on how to be more inclusive. New innovation programs actively seek voices that are missing from the discussion." —Technology

"It's all about widening the net. If you go to the same places to recruit, you'll get the same type of people. We've been actively engaging and expanding our network to organizations that will help us attract diverse partners and candidates." —Technology

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Innovator Perspective: Johnson & Johnson

Wanda Hope
Chief Diversity & Inclusion Officer

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Johnson & Johnson

"Diversity and inclusion has to be considered a business priority, just like any other opportunity that comes the organization's way. There also has to be the right tone at the top. The most senior leaders of the organization have to…believe in this."

"One of the things that we're clearly seeing pop out in society over the last couple of months is the fact that there are inequities that are inherently built into systems and processes. So, you have to put the right resources and the right focus around trying to break some of those systems and processes and identify where there may be bias or where there may be inequities."

"We use artificial intelligence to try to mitigate possible bias and our job descriptions. We train all of our people, leaders and hiring managers, on how bias may seep into thinking to make sure that we are being as objective as possible when we're interviewing and hiring talent. We've had more than 95 percent of our employees participate in that training."

"Another way that we drive [diversity and inclusion] for every employee is that it's actually baked into the leadership behaviors, and expectations of our employees, and that is linked directly into performance and development. … This is not just something coming out of the Office of Diversity and Inclusion. It's baked throughout our talent processes, and practices, and systems."

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Most Important Change You've Made

We invited respondents to share additional detail about the most important changes that they've made in 2020. A selection of their responses follow, along with the industry they represent:

"Attempting to better define and market the value-add of embracing disruptive innovation." —Aerospace & Defense

"Higher alignment to short-term goals for next 12 to 18 months. Triggered by reduction of funding across the board. Full support for innovation efforts still exists." —Agriculture

"A shift in thinking (and execution) from a few formal transformational IT projects to many small, agile, and impactful ones, supported by a mandate from C-suite to 'think like a startup.'" —Automotive, Transport & Logistics

"We started to collaborate with other commercial groups within the organization. This provided a great chance of success (i.e., more budget, more collaborations)." —Consumer Goods & Products

"We are working towards new startups within the company. The board has a financial bonus for getting them started." —Energy & Utilities

"We put half our team on a 'work at home' effort to explore tech solutions that would enable productivity and sustain culture in a remote work context. Pre-COVID, 'telework' was the elephant in the room that no one wanted to look at or invest in, so there was no appetite. Post-COVID, there was no choice." —Financial Services

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Most Important Change You've Made (continued)

We invited respondents to share additional detail about the most important changes that they've made in 2020. A selection of their responses follow, along with the industry they represent:

"More demand for innovative digital capabilities and a lot of leadership buy-in and attention. Capabilities that were perceived as things of convenience have become must-need items now." —Healthcare

"We found ways to support our network of innovators through new programs, taking existing programs virtually and expanding globally, expanding existing programs to support specific needs, and delaying programs that were not as relevant during this time. The C-suite has responded favorably and has been a source of information to better understand needs of the organization." —Pharmaceuticals & Life Sciences

"We initiated several new projects exploring post-COVID consumer pain points and issues with systemic racism, in an effort to find emerging areas of commercial or community opportunity." —Retail

"Adding better measurement tools and risk analysis to 'front-end' innovation, so as not to waste money for wrong selections of opportunities." —Technology

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Reporting Structure

To which C-level leader does your team report?
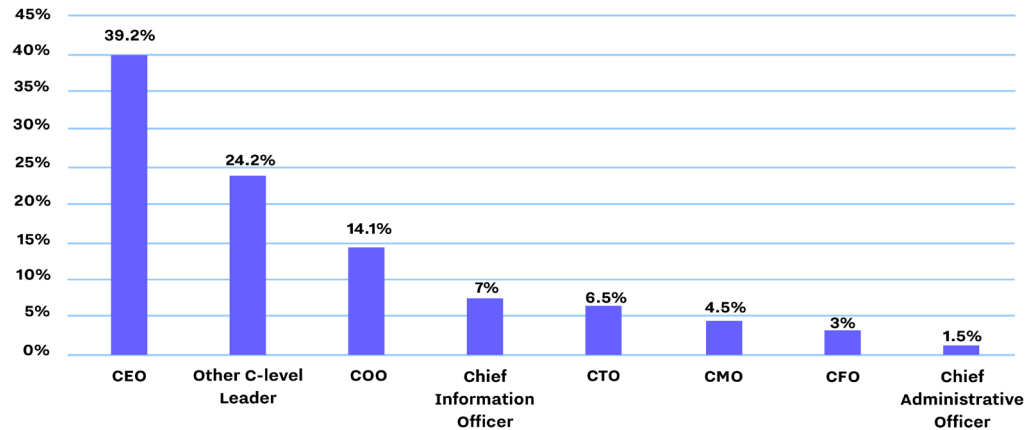
Other Responses Included

Chief Business Officer
Chief Commercial Officer
Chief Customer Experience Officer
Chief Growth Officer
Chief Legal Officer
Chief Officer of Growth and Acceleration
Chief R&D Officer
Chief Solutions Officer
Chief Strategy Officer

While 39 percent of the innovation leaders who responded to this survey told us they report directly to the CEO, beyond that we heard about a wide range of reporting relationships, from Chief Growth Officers to Chief Academic Officers to Chief Operating Officers. Three survey respondents told us that they *are* the CEO, and thus report directly to the board.

Every reporting relationship is different, and subject to interpersonal dynamics, but getting consistent attention, air cover, and resources from an influential C-level leader is a prerequisite for delivering significant innovation outcomes over time.

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Impact of Short-Term Expectations

To what extent do the company's short-term financial expectations impact your ability to invest in innovation?

2019 Survey: Benchmarking Innovation Impact

0 ⎯⎯⎯⎯⎯⎯⎯⎯⎯ **6.2** ⎯⎯⎯⎯⎯⎯⎯⎯⎯ **10**

2020 Survey: CxOs & Innovation

0 ⎯⎯⎯⎯⎯⎯⎯⎯⎯ **6.4** ⎯⎯⎯⎯⎯⎯⎯⎯⎯ **10**

(0 = not impact at all; 10 = the factor with most impact)

We didn't see a giant leap in how short-term financial expectations—such monthly sales targets or quarterly earnings—are impacting innovation investment in 2020. Our pre-pandemic benchmarking survey in Q2 2019 found that those near-term goals had a moderate impact on how organizations allocate innovation resources (6.2 on a scale of 0 to 10), and in Q3 2020, the number had only risen to 6.4.

Some respondents told us that there has been a "shift toward shorter-term wins" and that "financial objectives related to EBITDA reduced our R&D spend," but others had "obtained board-level approval for a three-year investment" or "expanded to making strategic investments in startups." That may explain this middle-of-the-road data point on how short-term financial expectations are impacting the ability to invest in the future: In some organizations, the pressures of 2020 are leading to cuts and frugality, while others are planting seeds for future harvests.

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Jason Field
President & CEO

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W.L. Gore & Associates

Balancing Today and Tomorrow

"[To effectively manage both today's operations and tomorrow's innovations,] you need good data, and you really need to have a commitment to individuals who can bring that data forward with insights in a very consistent…way. And then you need good judgment. … We've had a long history of leadership who has just had a knack for asking the right questions and seeing into the right opportunities. Certainly the legacy of [our founder], Bob Gore, is that incredible ability to zero in on the right question, ask it, and get to the deep insights. … If there's one thing I try to poke at, it's who in the room has the ability to ask that question of this particular project to draw out that deep insight."

Adjusting to Remote Work

"In the spirit of innovation, I think it's to be looked at as an experiment, and [you should] not assume that what's happening right now is good or bad, but just that it's different. … Probably the biggest thing that jumps out is if you're an individual sitting outside of a plant cluster in a region, it really does level the playing field when we're all engaging virtually. … I'm pretty optimistic that we're going to find some real benefits that will carry forward as we come out of this phase that mandated [working from home]."
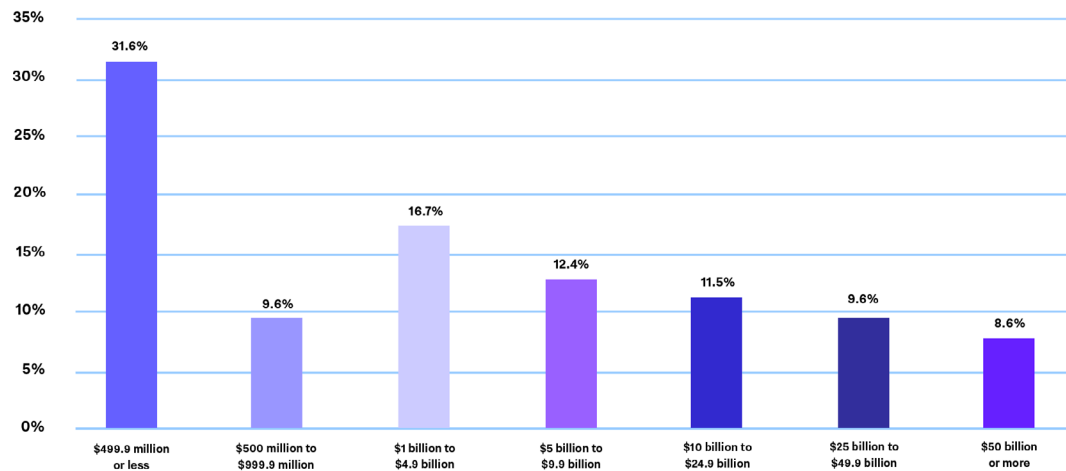
How to Succeed

"It takes a focus on the long term, and it takes patience. It also takes perseverance and pushing and not settling. At any point in time…you have to bring that sense of urgency together with that long-term view."
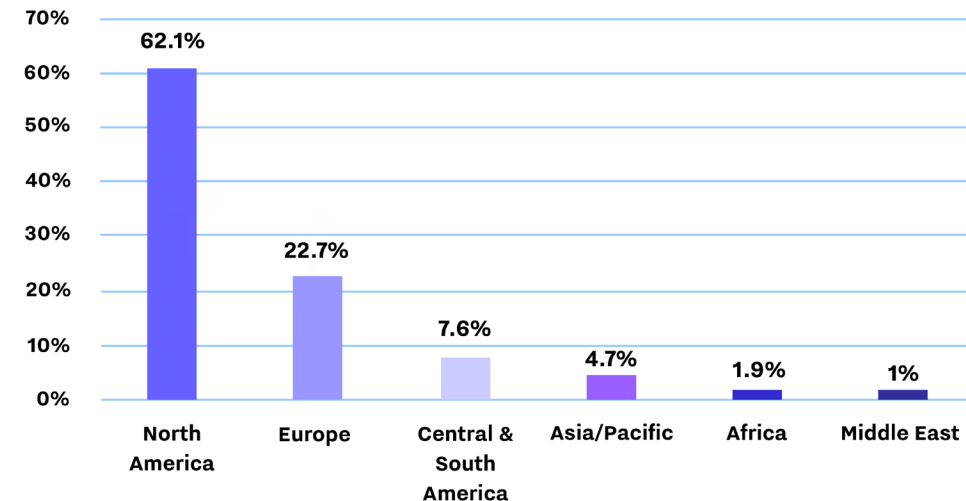
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About the Respondents

This report is based on data collected in September 2020. We received 211 qualified responses. The top five industries represented in the survey data set were: financial services, energy and utilities, consumer goods and products, healthcare, and technology.

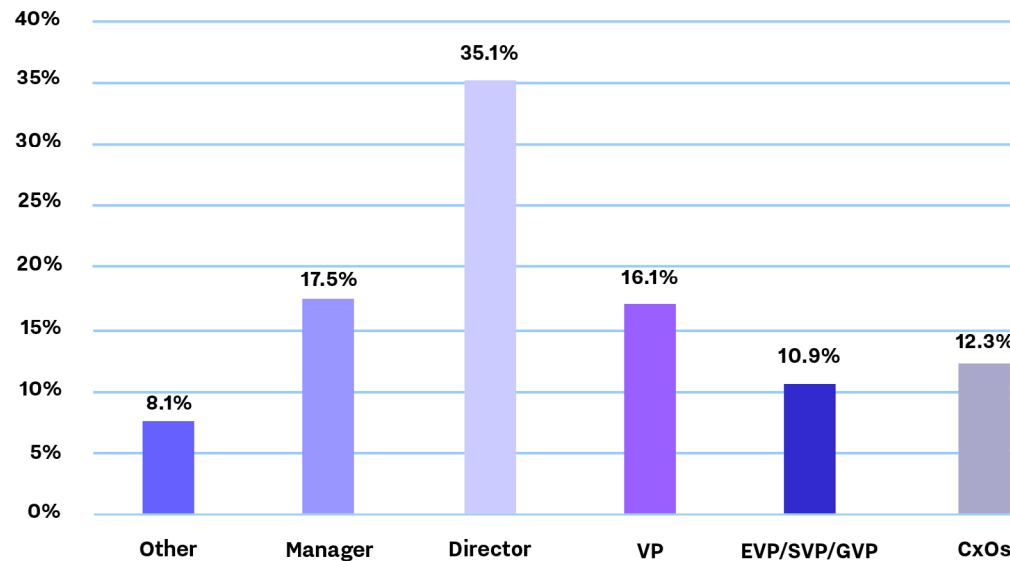## What is your organization's latest level of annual revenue?

$499.9 million or less	31.6%
$500 million to $999.9 million	9.6%
$1 billion to $4.9 billion	16.7%
$5 billion to $9.9 billion	12.4%
$10 billion to $24.9 billion	11.5%
$25 billion to $49.9 billion	9.6%
$50 billion or more	8.6%

Where is your organization headquartered?

North America	62.1%
Europe	22.7%
Central & South America	7.6%
Asia/Pacific	4.7%
Africa	1.9%
Middle East	1%

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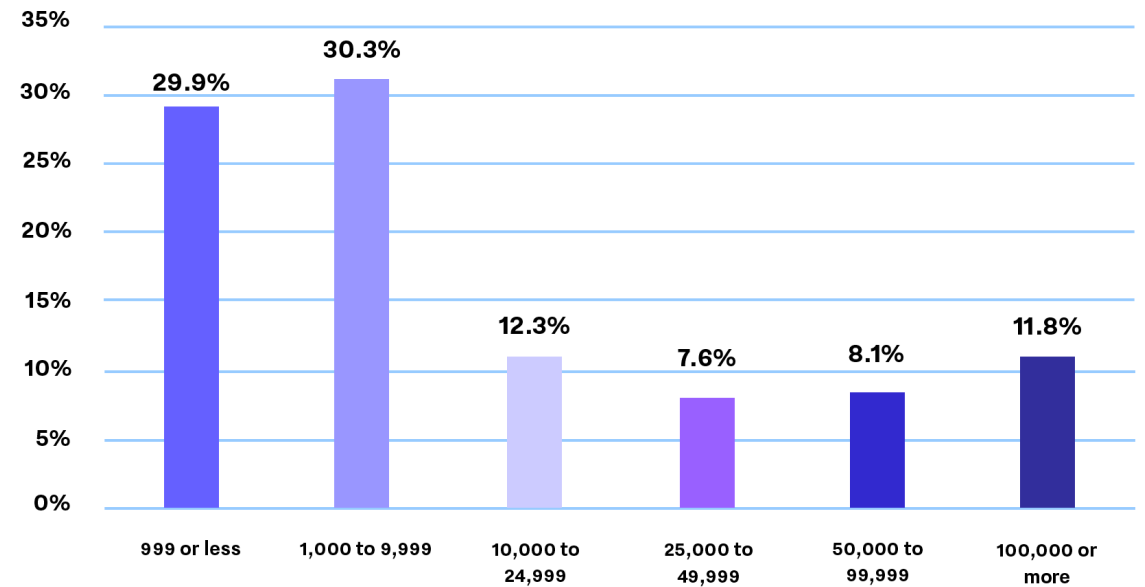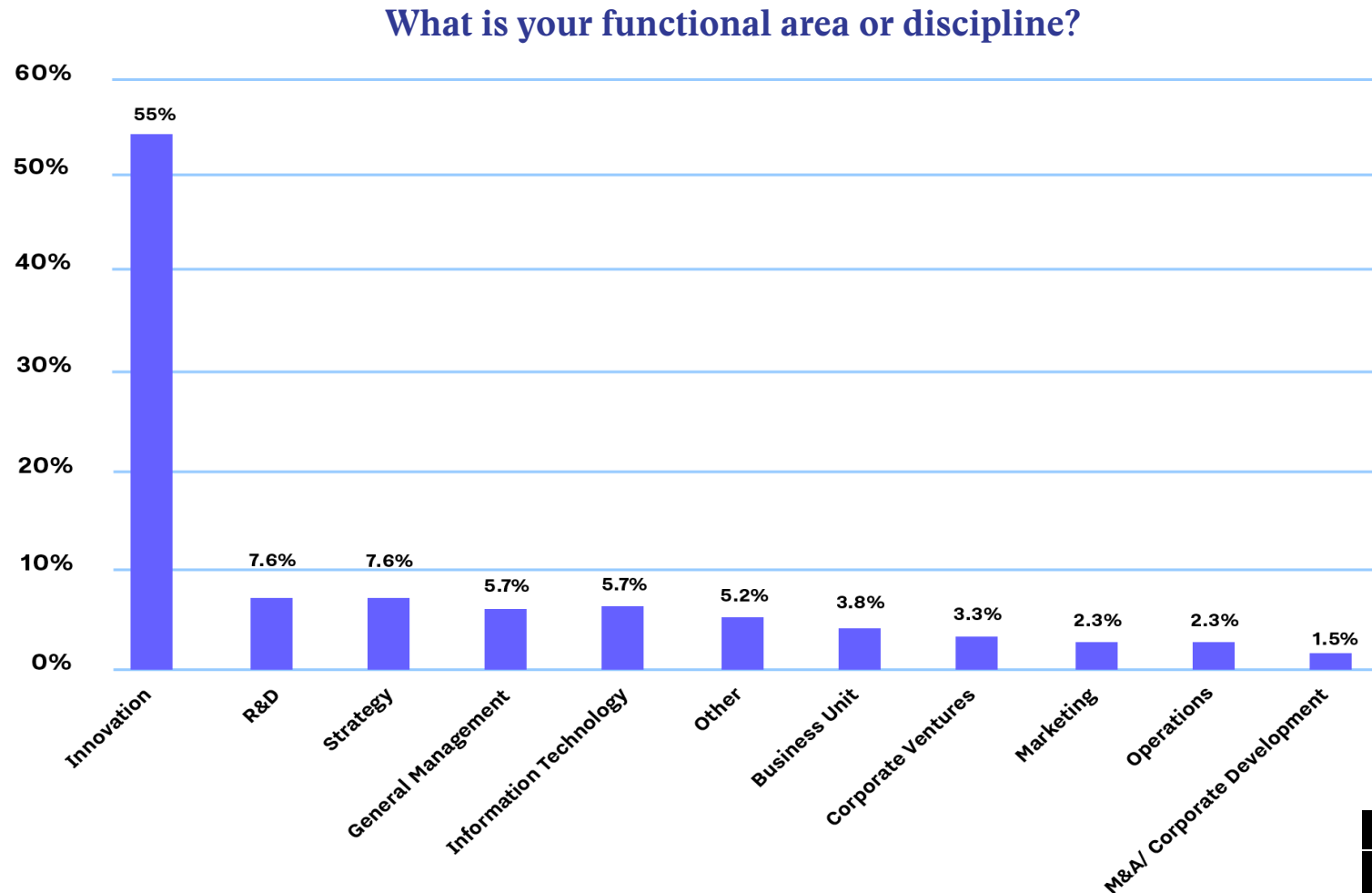
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