Panorama

THE FUTURE of Leadership
**are we evolving in
the right direction?**

Contents.

Panorama at a Glance.

Panorama is a **global community** of **20 firms** across the globe. Our **leadership experts** have come together to promote a diverse perspective of top management, foster creative thinking and share competencies and experiences for the **benefit of our clients.**

Dedicated People

400

Established In

2009

Partner Firms

20

Countries

24

Executive Summary.

Our organisational purpose is **to share** global and local experience and new perspectives enhanced with local insights. To support this, we have initiated an annual *Leadership Survey* to consider challenges and themes facing today's leaders.

By closely listening to our clients and communities, we always stay updated to support leaders more effectively. This survey focused on **purpose-driven** leadership, innovation, strategic planning, leadership challenges, and business complexity.

We are extremely grateful to those who gave their time to share experiences, insights and examples across these topics.

Methodology.

Leaders completed an online survey separated into five sections over an **eight-week** period in late **2023**. This survey included multiple choice, open, and priority-based questions.

We received responses from **150** participants across five continents. We included a range of business types, industries, functions, revenue and size.

The findings have been collated, analysed, and shared with participants and our wider global community through targeted distribution **at a senior leadership level**.

"As a global community of leadership experts with authentic local expertise, our aspiration was to initiate the tracking of our clients' trends and critical challenges through this inaugural annual survey. The content you are about to explore represents the culmination of our first annual survey on 'Purpose-Driven Leadership.' We dedicated special attention to delving into the realms of passion in leadership and to comprehend how it is perceived and experienced across various markets and cultures."

Roy Herold
Panorama Chairman
2022/23

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CHAPTER 1

Purpose Driven Leadership

Is Purpose Fundamental to Leadership Excellence?

People make an organisation work. Without the right people there will be no **success, growth** or **opportunity in** respective organisations and sectors.

To **attract the right people** who want to **be part** of that **success** , it is crucial to have a **clearly defined** purpose which is **authentic and believed**.

Ultimately, this is the **responsibility and function** of the **leadership** team. People need a **purpose to be passionate**. That passion breeds success and ultimately it should **lead to profitability**.

With that in mind we want to discover if leaders **are putting enough emphasis on purpose**, and how embedded this is within their own organisations. Through the survey and responses, we look at the **culture framed** around the purpose and the challenges it faces in an uncertain and complex environment.

Purpose, Passion & Profitability.

"76% were progressive towards Organisational Culture while 24% were more cautious"

A progressive view of organisational culture was noted amongst **76 percent** of our respondents, with **32 percent** describing it as 'collaborative'; **27 percent** as 'innovative' and **17 percent** as 'inclusive. **However, a more cautious view came from** almost a quarter who described their culture as 'conservative' (**14%**) or 'hierarchical' (**10%**).

How would you best describe the culture of your organization?

Inclusive 17%

Innovative 27%

Collaborative 32%

Conservative 14%

Hierarchical 10%
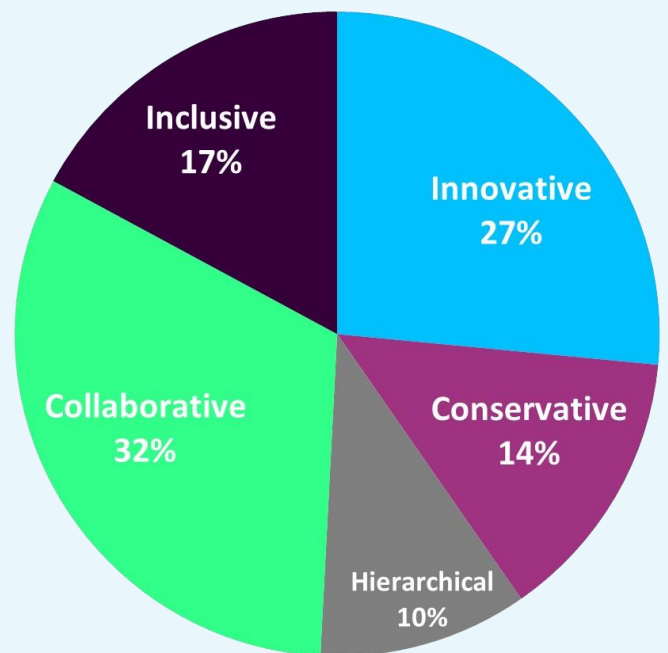
CEO's Insights into Employee Engagement and Future Strategies.

What percentage of the company is well informed about vision and values?
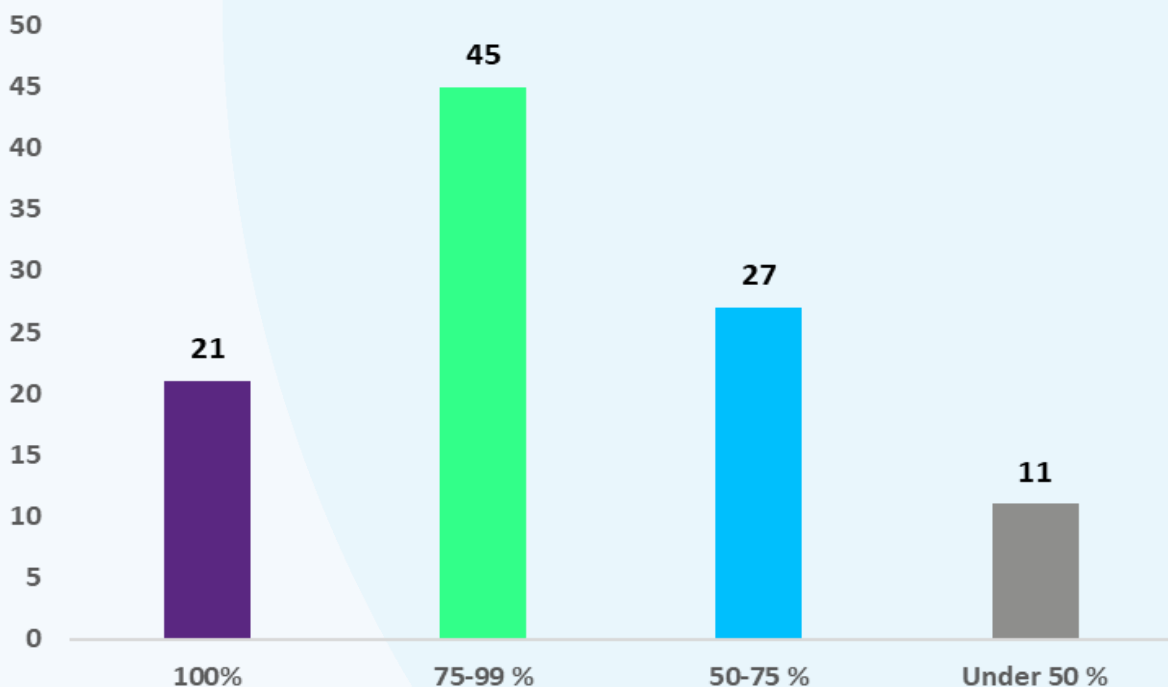
The importance of promoting a clearly defined culture and its associated vision and values with staff was clear among our respondents. Nearly **90%** of respondents believe that over half of their employees are well-versed in the company's culture, vision, and values.

Leaders actively contribute to this understanding, with **41 percent** sharing updates quarterly, **24 percent** monthly, and **13 percent** daily or weekly.

Purpose-driven leadership intensifies the **spotlight on ESG** practices, with **31 percent** fully integrating them and **17 percent** initiating isolated efforts. Nevertheless, **20%** are purely reacting to legislative demands (**13%**) or lack a defined strategy in these areas (**8%**)**.**

We asked our respondents to share insights about what cultural **challenges their organisations faced in the next three years** and there were clear themes dominating.

The need to integrate **staff back** into a more **hybrid working environment** – with remote and office working presents cultural challenges, which also impacts on staff retention and the challenges of a 'disengaged' or 'disillusioned' employment market, making **hiring and retaining difficult**.

The next three years are full of challenges.

Another dominant theme was **the need to promote, embed and sustain diversity and inclusion** across all organisations. This **brings cultural challenges**, regardless of organisational size or focus, but it is repeatedly emphasised as something that needs to be done more consistently.

Specific sectors are facing greater **challenges from a Research and Development (R&D)** perspective or the need to **grow new market share** and **drive profitability**, or those with operating models that are evolving face **cultural challenge** from staff and shareholders.

Leadership in Action:

Walk the walk and talk the talk IS culture - what you do, not what you say, matters most.

It was very clear that **leaders are championing purpose and culture**, transcending sector and geography.

There is a resounding understanding that **people must be at the forefront**, necessitating regular communication, involvement, and shared responsibility at all levels. However, **leaders do stress** the vital need to '**lead by example**' — to manifest purpose and embody values extensively, ensuring enduring success.

People, Rituals & Process.

This journey is not always easy, especially in a post-pandemic world with so much instability.

Still, with the **increased use of technology and an emphasis on inclusion**, purpose-driven **leaders have the opportunity to forge unity among teams** and individuals, steering them towards a shared direction.

Action, Technology & Unity.

Takeaway moment.

Practice is the best teacher! What are companies around the world doing to strengthen their culture?

● Embodying the principles – walk the walk; talk the talk.

● Encouraging real case debates and discussing decisions that reflect organisational culture and values.

● Hosting frequent meetings to review various issues, focusing primarily on overall values, and not just work and achievements.

● Implementing recognitions/awards tied to values, organsational platforms, and programs to better communicate.

● Ensuring culture and values are incorporated into remuneration.

● Integrating into onboarding, internal communication, and talent appraisals.

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CHAPTER 2

Accelerating Innovation

How Companies Prioritise, Measure, and Tackle Challenges on Innovation?

The **importance of innovation in driving our industries forward** and addressing economic, environmental, and social challenges **is clear**. However, it's **not consistently a top organisational priority**.

While there's emphasis on evolution, we question its effectiveness. We want to know if innovation, **both as a concept and as an approach, is still being prioritised by leaders**. We asked them how it is **measured** and what **challenges or inhibitors** there are to **promoting and embedding innovation**.

The importance is clear, but the path is not yet walked for some.

How do you prioritise innovation in strategic planning?
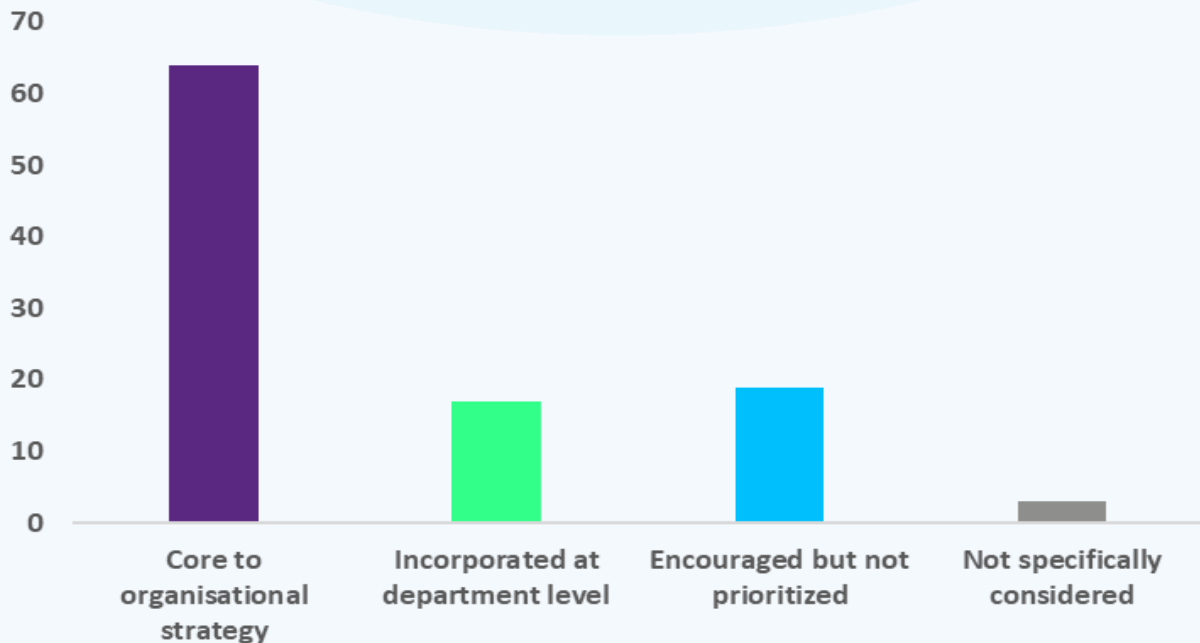
Our respondents do prioritise innovation. **62 percent** believe that it is core to their organisational strategy, with only **3 percent** saying it was not specifically considered. There are those moving towards its greater integration with **17 percent** incorporating it at department level and **18 percent** encouraging but not yet prioritising it.

According to our responses, **innovation is spreading beyond** some more **'traditionally innovative'** sectors as technology, manufacturing and healthcare. It is also **reaching all businesses** and is being incorporated into regular communication, strategic planning, sales strategy and cultural development of many companies.

Across all Sectors, Sizes & Regions.

Measuring is crucial to evolve towards effectiveness.

With a clear emphasis on innovation, we also wanted to understand how frequently this is measured for success through KPIs. **31 percent** noted that they regularly reviewed innovation initiatives, with **33 percent** stating they did this incrementally. **20 percent** were infrequent in measuring innovation success and **16 percent** never did it as they have no metrics currently in place to do so.

If it is a priority, it needs investment.

What strategic or operational challenges prevent innovation in your organisation?
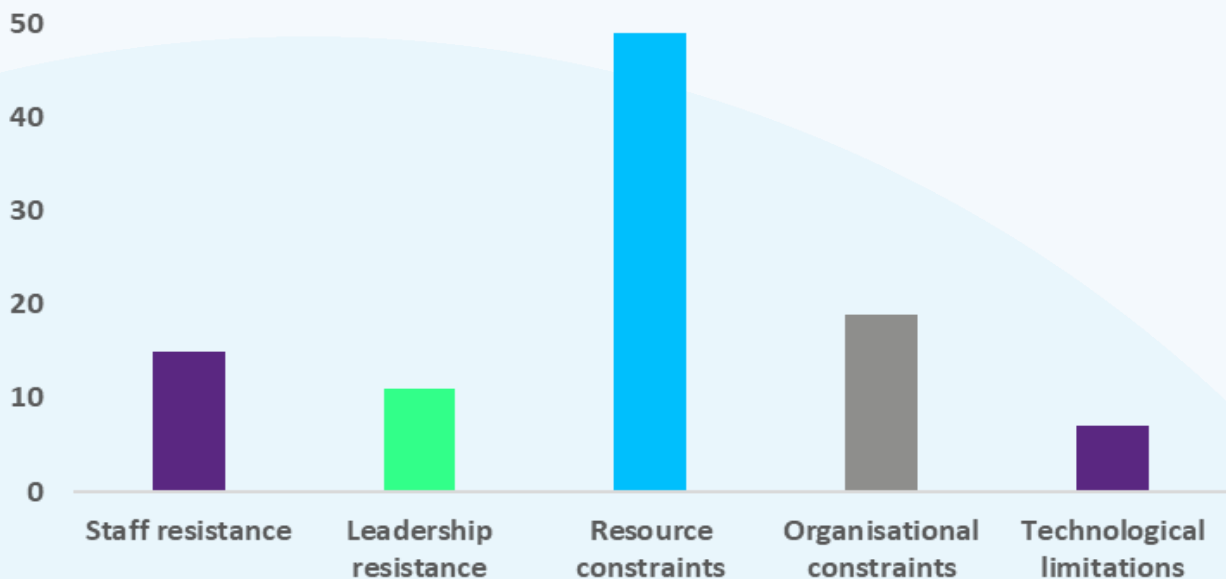
While innovation is important to many of our respondents, we are aware that challenges also exist to its adoption and management. We asked respondents to highlight where the barriers and challenges lie.

Resource constraints were the biggest challenge for almost half (**48%**) with an even split between staff resistance (**15%**), leadership resistance (**11%**) and organisational constraints (**19%**). Only **7 percent** noted that technology was a constraint at this point.

The challenges of Innovation.

The landscape of **innovation** is marked by a multitude of **challenges**, and their nature **often varies based on sector, region**, or organisational **size**. A significant impediment arises from **staff resistance, driven by fears of job security loss**, creating a **barrier** to the adoption of innovative practices. **Technical challenges** compound the **issue, particularly in some regions**, which can be a **big challenge to global companies**, impacting both internal company processes and the development of new products.

The constraint of limited resources adds another layer of complexity, especially when the organisation is predominantly guided by the day-to-day operational demands. Navigating these challenges **requires a nuanced approach that considers the unique dynamics of each sector, region, and organisational size**, fostering an environment conducive to innovation while addressing concerns and resource constraints.

Innovation: Driving Growth, a Force in Leadership, and the Challenge Across All Sectors

Innovation is **not a buzz word**, it is clearly vital amongst so many of our participating leaders and is **being more and more embedded across organisations of all types**, sectors and sizes. Its **importance at a cultural level**, cannot be underestimated and we believe that this will only continue to get **more significant.**

Innovation **must be encouraged**, but to have a better sense of long-term success there should be **more focus on resources, effective measurement and consideration**. This should happen **at executive and board level**, but importantly leaders need to think about how this reflects and is responded to **more widely across all their people**.

Planning, Investing & Tracking.

Takeaway moment.

Practice is the best teacher! What are companies doing to implement or accelerate Innovation Initiatives?

- **Spreading the word – Innovation needs to reach from boardroom to office floor.** The operational team must have a focus on execution and delivering goals, and leadership team focusing on adapting the business model to ensure change is normalised.

- **Understanding that Innovation is mindset and mindset is culture –** Companies that live and breathe innovation, talked about open environments where employees are free to rethink and reimagine. These companies are investing in their teams to gain technical knowledge and mindset.

● **Communication is a must –** Through regular meetings, 'Innovation Days' to solve companies' problems, workshops, or even topical one-on-one between different people or focus groups for brainstorming.

● **Having a sponsor to focus on innovation** – It is necessary to have someone looking for opportunities. Examples include business-accelerator programs; benchmarking; dedicated departments, such as digital labs/innovation-focused units, committees, or partnership and open innovation initiatives.

WHAT ABOUT MEASURING? – Some examples of how respondents track results from innovation initiatives include:
● S.M.A.R.T. methodology
● Board involvement
● Digital penetration on sales
● OKR or KPIs
● Revenue or sales
● Innovation project development
● Employee and customer feedback

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CHAPTER 3
Strategy Planning

Strategy thrives when it permeates the whole company.

Strategic planning **is a fundamental function** of senior leadership. Its implications filter through an organization to every level and **can be considerable**. With such responsibility and liability there is a question about **how deeply involved other parts of the organisation should be**, and not simply at executive or non-executive level.

Like purpose, a strategy **must exist to ensure everyone is moving in the right direction**, but it is sometimes not as clearly articulated or shared.

We would like to understand **how widely strategic planning is considered.** We also look at **how it is measured and prioritised** to be regarded effective.

Behind the Strategy Curtain.

We asked our respondents to consider their strategic plan and who they involved in its review to get a sense of how widely leaders share and gain input.

Other

Shareholder

Non-Exec

Staff
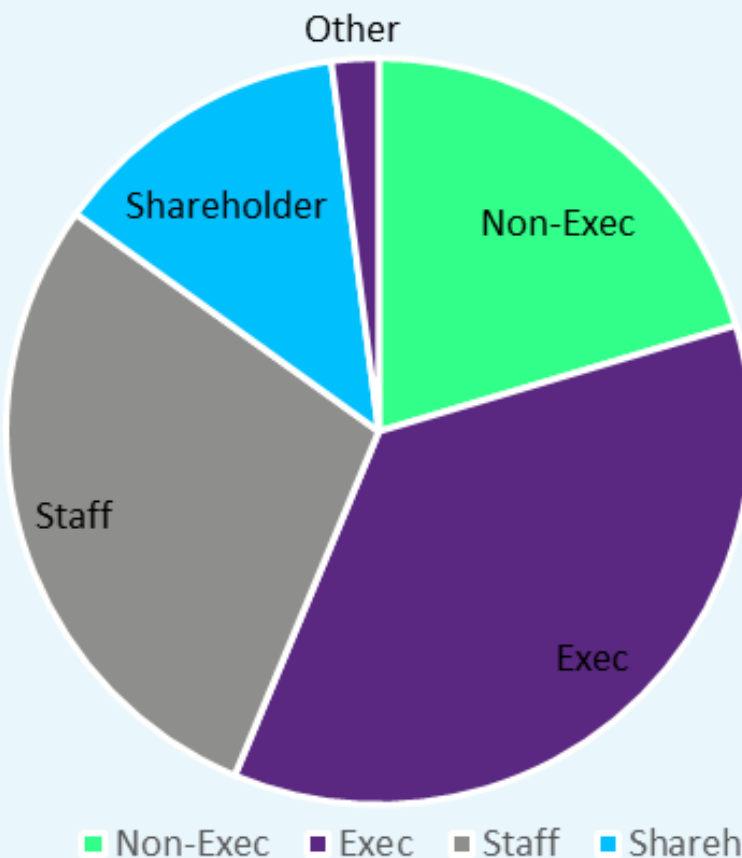
Exec

Which stakeholders do you involve in the strategic planning process?

■ Non-Exec ■ Exec ■ Staff ■ Shareholder ■ Other

Perhaps less surprising is that the **strategic plan remains the preserve of the executive and non- executive functions** with **36 percent** and **20 percent** respectively being the key stakeholders involved. However, interestingly **29 percent** of leaders also involved staff more widely and **13 percent** incorporated shareholder feedback too. We recognise that this outcome may vary dependent on the structure or type of organisation.

Stakeholder Involvement, Review Frequency & Organisational Planning.

The frequency with which the strategy is reviewed reflected its importance at a leadership level. Over **83** percent stated that it is actively reviewed annually (**52 percent**) or more frequently (**31 percent**). A less frequent time of every **two to three** years was shared by **12** percent and **5** percent stating that it was only at times of crisis or transformation that the strategic plan was actively considered.

Strategy, Planning & Execution.

What drives strategy?

We asked respondents to consider **what influenced strategic approach** and where they **allocated resources and time to reflect this**. The chart on the next page reflects the key drivers. The most important influence by a clear margin was **when a crisis arose (and this includes, cost of living, geopolitical, pandemic)**, and this was followed by regular review. **Market demands and shareholder expectations** were fairly equal as priorities to influence strategic approach. Those who did no specific prioritising were a tiny portion of our respondents.

How do you monitor and evaluate the effectiveness of your strategic plan?
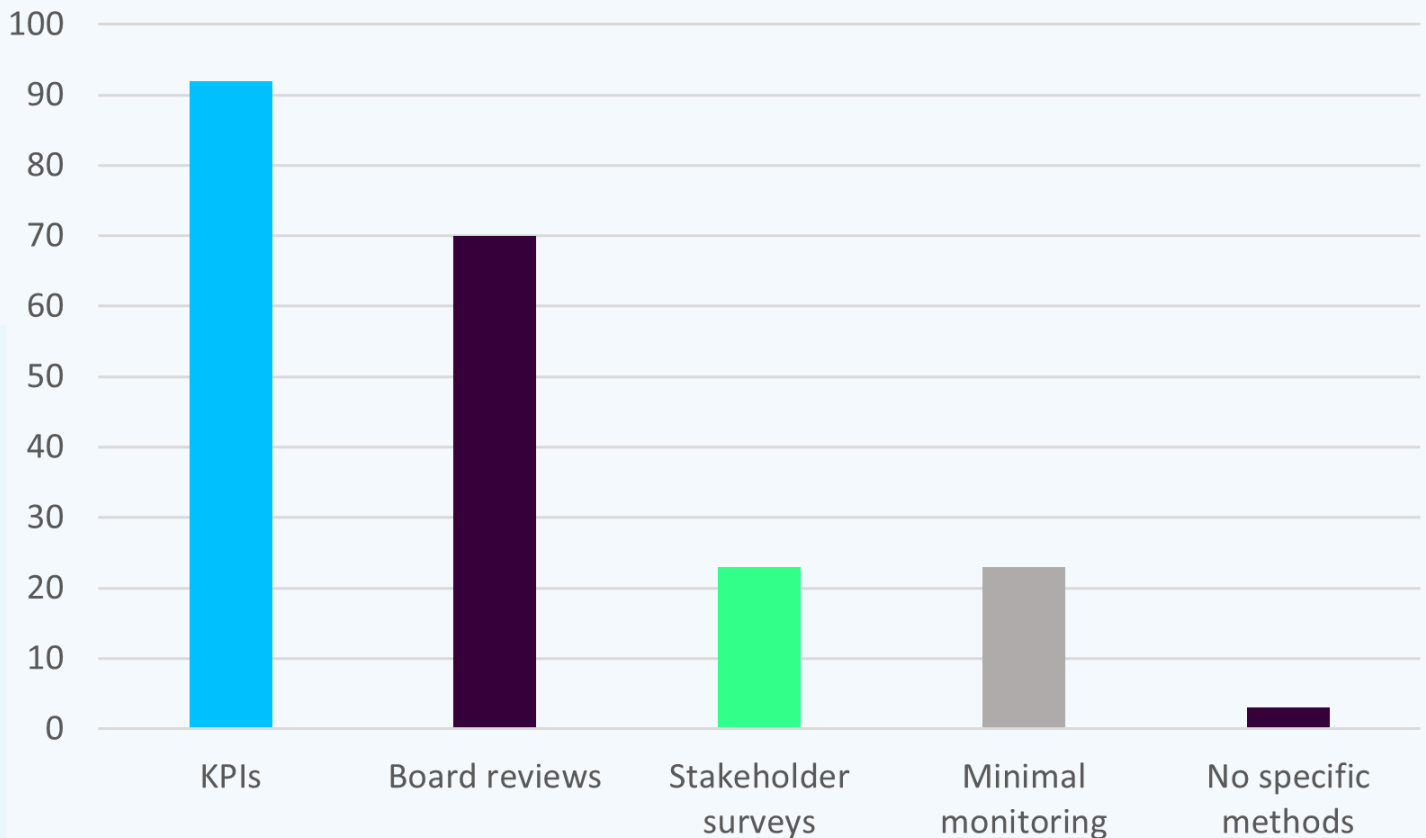
The most popular methods used to monitor and evaluate progress and effectiveness of the strategic plan were through **KPI metrics** (**44 %**) and **Board reviews** (**33%**). 11 Percent used **stakeholder surveys** and a further **11** percent cited minimal monitoring.

We asked our senior leaders to **share examples** of how they facilitate strategic thinking and encourage input and discussion within their organisations. The **responses were varied** and include more **informal methods such as team and company meetings, project management tools** (such as discussions using tools like Slack) and regular **encouragement of open discussion and sharing.**

There were those who take a more formal approach through **designated moderator-led executive workshops, shareholder strategy sessions and new business strategy development and targeting**.

To ensure that there is **alignment with the strategic** vision and the **day-to-day operations** we asked respondents to share examples of their approach to this. It was apparent that this is embedded at a strategic executive level, but also **filtered throughout the business**, measured through OKRs and KPIs on a daily and annual basis. There was some recognition that in certain organisations **more needed to be done** to **involve middle and accelerating management in strategic planning**.

Leading Through Crisis and Transformation.

Strategic planning is a fundamental part of the **leadership approach** for most of our respondents, **but there are times when this is more important.** For example, during **periods** of **crisis** or **transformation** as might be expected.

Since the start of 2020 many regions and industries have been **in some mode of crisis** and we have witnessed this impacting the approach of leaders, so **we are not surprised** especially at these outcomes.

We would like **to continue to monitor this** over the coming years and understand if and how this changes. We anticipate that there may be a greater **emphasis on strategic planning right across organisations**, with more involvement of stakeholders or shareholders as a collaborative and culture-led approach becomes more normalised.

Takeaway moment.

Practice is the best teacher! What are companies doing to facilitate strategic thinking at all times?

● Holding annual planning days and leadership offsites, fostering collaboration and strategy alignment within the leadership team.

● Hosting quarterly meetings as a formal mechanism to track and assess the progress of strategic initiatives.

● Defining success metrics including revenue, board reviews, and clear KPIs/OKRs, particularly evident in larger companies.

● Introducing external moderators to strategic meetings provides expert guidance for identifying key focal points.

● Organising workshops, hackathons, cross-organisational targets, and team collaboration events.

● Recognising the pivotal role of individuals through remuneration, rewards and recognition.

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CHAPTER 4
Leadership Challenges in Today's Environment

The future will be led by those who can harness opportunity.

The **unprecedented environment in which we live impacts all organisations**. Geo-political, environmental, economic and societal challenges are substantial. From **2020**-**2022** every organisation and individual felt the effects of the coronavirus pandemic – some worse than others. We have emerged from that into a world that remains full of challenge.

However, **without challenge there is often little opportunity** and those leaders **who can harness it** are the ones that **remain at the forefront** of business and their industries.

We have talked to our respondents to understand what the challenges have been and how **they have approached them to sustain, support and grow** their organisations, and maintain a positive approach to leadership.

Our respondents were asked if the **changing** business **landscape had impacted** their **leadership approach** and over two thirds believed that they had adapted, with **23** percent believing they had to make minimal adjustments and **1-2** percent saying that they didn't have to make any.

One of the changes that has been so significant is the **introduction of remote or hybrid working**. We wanted to understand how leaders have navigated the complexities of **managing remote teams and maintaining effective communication and collaboration** in these scenarios. This has largely been delivered with an increased regularity of meetings online and in face-to-face settings.

Adaptation, Communication & Advancements.

"Understanding people's differing needs and using different tools to adapt to them"

We wanted to understand how leaders were encouraging the diverse needs and expectations of a multi-generational workforce. **An emphasis on individuality was shared repeatedly**. Increased exposure and **access to leaders** where possible and the need to show a **'human' side** through **multiple different platforms**, including digital, face to face and team or company wide meetings. The need for greater creativity in interaction and with the tools and solutions being used was noted. **Communications and HR functions were highlighted** as more important in this activity.

An **increased** allocation of **resources to training, development and cultural and creative integration were also highlighted**. People were at the centre of it all and understanding how new generations and post-pandemic working has impacted the requirements and expectations of staff. **This must be reflected by leaders**.
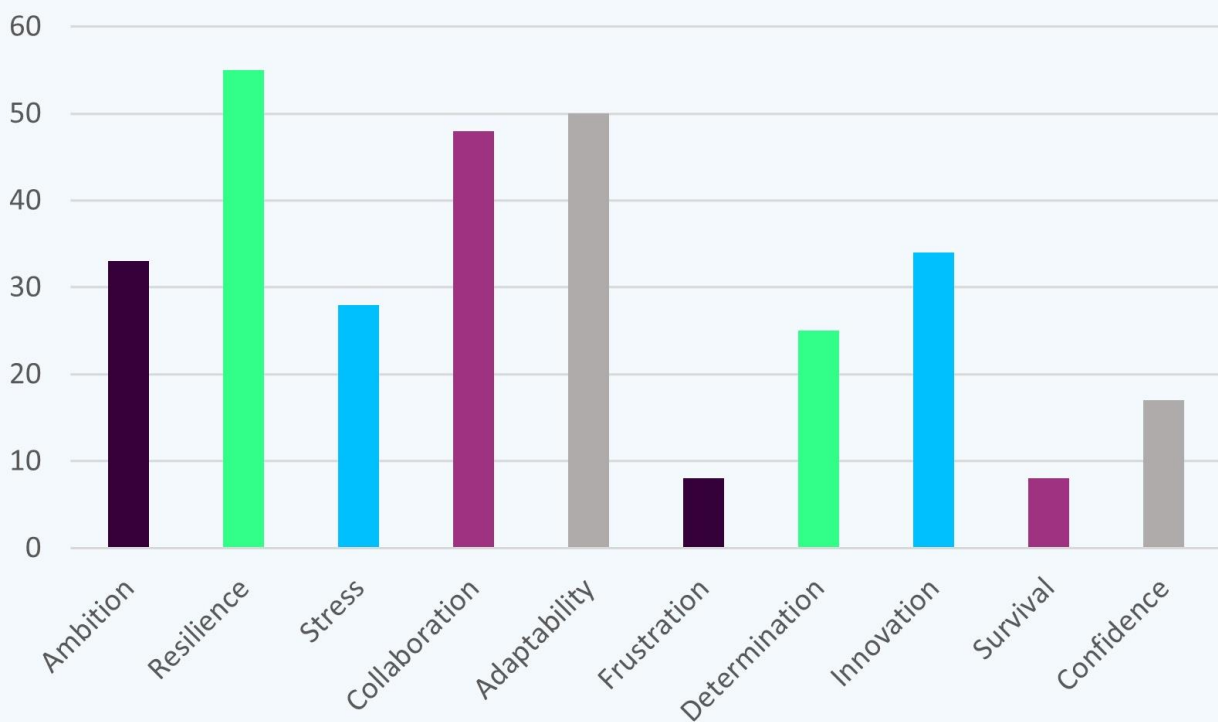
Across a more **diverse society** there is a greater demand for ethical and socially-responsible leadership and we wanted to understand how our leaders are actively addressing this. ***'Greater transparency', 'more personal participation'*** and the ***'introduction of 'ethics committees'*** were all examples. In certain organisations it was highlighted that this has always been a key value and continues to maintain priority. This must be demonstrated by **leaders to ensure that it is embedded across the organisation.**

Some other examples included **projects with universities** and institutions to highlight the importance of a people-centred approach and how it can benefit society and economic development more effectively.

People, at the Center.

We asked our respondents to **prioritise the attitudes** they consider most prevalent in their industry or business today.

What are the most prevalent behaviors in your industry or business today?

Behavior	Value
Ambition	33
Resilience	55
Stress	28
Collaboration	48
Adaptability	50
Frustration	8
Determination	25
Innovation	34
Survival	8
Confidence	17

The outcome was very positive and shows that the challenges of the past two to three years are extracting more positive responses from business and encouraging more specific attitudes such as **'resilience', 'adaptability' and 'collaboration'**. The least selected (as per the table) were 'survival' and 'frustration' which shows a more positive attitude reflected across all the regions and industries we talked to.

We asked our respondents to share **specific examples** of the **challenges** they have faced and **strategies employed to navigate** through them. There was recognition that 'pandemic mode' had passed and that **people were looking to the future** and how they can better work together. That reflects the theme of many of the examples – **a far greater emphasis on people, culture and communication**. Even with the example of people being made redundant – it was acknowledged that this was done with a much more **humane approach** and not through a *'faceless consultation'* approach. Proactivity is keen and shown in an approach to challenging situations, with a much greater emphasis on *'engaging rather than 'verlooking'.*

The notion that a more *'traditional response'* does not cut it anymore, with the greater **use of digital as a must**. This has taken some adjustment for certain organisations but is having a **positive effect,** it was noted. The requirement for more **transparency across all levels to encourage** a stronger cultural response and belief in purpose has also been highlighted. This is a trend that we believe will continue for the foreseeable future.

Organisational Leaders in a Dynamic Landscape.

We asked our respondents to **share examples of how they led at difficult times** and deal with a range of topics, such as: **'how to adapt leadership in difficult times'; 'how to manage different generations'; 'how to encourage creativity within a profitable environment'; 'how to address ESG'**.

Despite the diverse range of ways to respond and deal with it, there were common responses, such as: **managing skills; transparent communication; open dialogue; training and learning**.

Navigating through difficult times is no easy task, but it brings lots of opportunities when led by truly engaged and prepared individuals and teams.

Takeaway moment.

Practice is the best teacher! How are leaders and their companies preparing to respond quickly in difficult times?

● Recognising the significance of time management, strategic planning, structured workflows, and proactive measurement.

● Acquiring new skills, including active listening, empathy, resilience, accessibility, and openness about personal shortcomings.

● Acknowledging that learning opportunities exist everywhere and with everyone.

● Establishing clear guidelines for work modes, emphasising increased discipline with schedules, transparency regarding deadlines, a thorough examination of workloads, and well-defined Key Performance Indicators (KPIs).

- Shifting leadership focus from teaching to coaching.

- Allocating resources progressively to training, development, and cultural integration.

- Prioritising governance and fostering transparency throughout all organisational levels.

- Embracing digital tools and technologies for enhanced organisational efficiency while preparing the workforce for their effective use.

- Cultivating networks that provide a platform for sharing and listening.

- Demonstrating consistency in actions; for example, refrain from increasing leadership bonuses during challenging company periods.

- Promoting employee well-being through clearly defined job descriptions and benefits such as healthcare.

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CHAPTER 5

Managing Businesses in a Complex Environment

Continuous change is the new normal.

Complexity has become a constant of the business environment. **Change, challenge and competition are at the forefront** of this, augmented by wider issues of climate and culture. Leadership **requires a broad and deep skill** set and an adaptability to change and learn.

In this context we wanted to **discover how leaders approach management** and how **they prioritise**. We've asked how they respond to risk, expansion into new markets and dealing with increased complexity.

In a complex business environment, there are often competing challenges, and this can demand a **different leadership approach**. We asked our respondents to consider at a macro level their most effective management style to achieve results. Adopting an **'agile management' was the top** approach, **followed very closely by 'continuous learning' and 'empowering employees'. 'Market research' and 'prioritising innovation' were selected less often**. This is **interesting** in relation to **Chapter 2** in this survey where **innovation is clearly important**, but in a **management style**, the emphasis on **being agile and curious**, as well as **people-centred, were more important overall to handle complexity**.

In a rapidly changing market, what is the most effective approach for managing a complex business environment?

Legend: ■ Priority 1 ■ Priority 2 ■ Priority 3
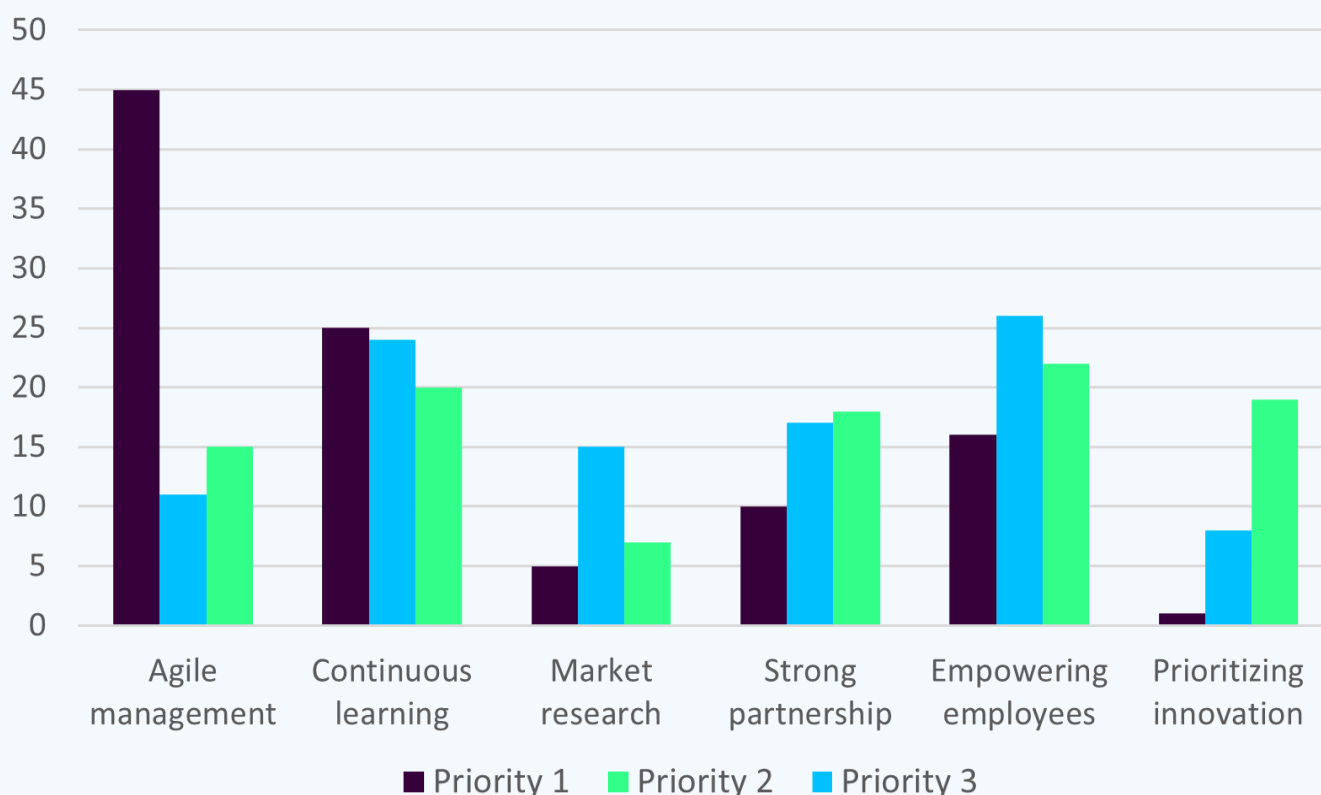
To uncover another layer of this management approach leaders were asked to **consider specific disruptive challenges and how a CEO should prioritise their response**. In a response consistent with our previous question, an **'agile approach', 'risk planning' and 'business and sustainability planning' were highlighted** as the most important. The least emphasis was on prioritising 'government relations and advocacy'.
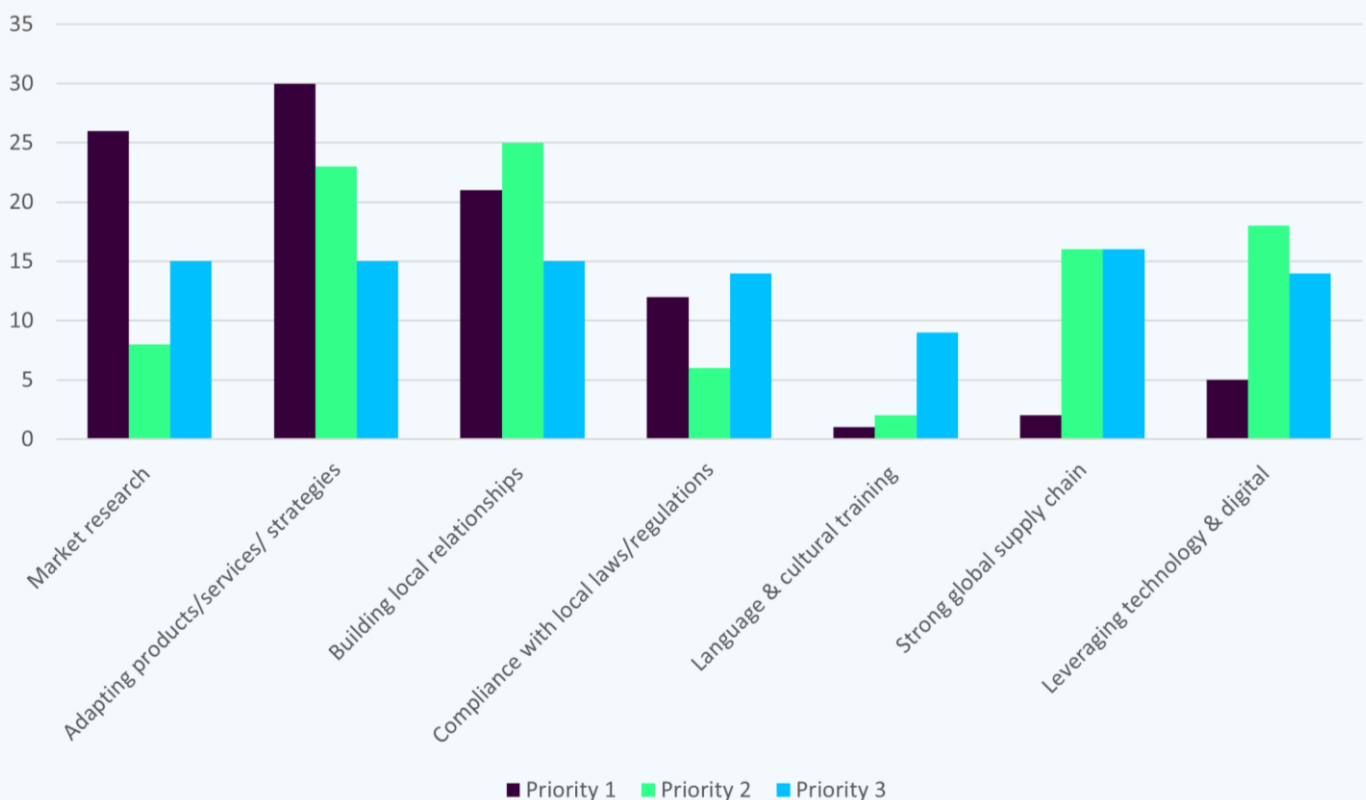
Risk management is essential across all business environments, but that increases considerably in a climate of complexity. We asked our respondents to consider this and prioritise the most effective approach. The dominant priority to effectively manage risk was highlighted as **'transparent communication',** followed by **'contingency planning'** and **'stress testing'.** **'Stakeholder relationships'** also scored well as a key priority. The area given **least priority** was the **'regular update of risk management'.**

Agile, Transparence & Risk Control.

Our focus for this **survey is global**, so we wanted to incorporate insights on implementing and delivering successful international expansion. We need to be clear that this question does not apply to all of our respondents, but we believe it is important to gain perspective from those who have **undertaken international expansion,** or those **who are or will expand**.

Those highlighted as the most successful approaches were **'adapting products and services to key markets'**, followed by **'building local relationships'** and **'market research'**. The lowest priorities to ensure international expansion success were 'language development' and 'cultural training'.

In a globalised business landscape what is the key to successful international expansion?

Bar chart with categories: Market research, Adapting products/services/ strategies, Building local relationships, Compliance with local laws/regulations, Language & cultural training, Strong global supply chain, Leveraging technology & digital

■ Priority 1 ■ Priority 2 ■ Priority 3

We asked our respondents to share examples of **strategies or approaches** they have implemented to effectively navigate and **adapt** to the complexities of **their industry and market**. Those included identifying new products for **in-region markets**, as well as thinking about **new regions to target**. There has been much closer focus on **vendors and building up relationships** as well as drilling down into **specific segments**. This has become a much more integral part of the scenario and **risk mapping for certain organizations** as they adapt to a challenging market and **look to encourage growth** in a complex environment.

Navigating Challenges and Embracing Risk.

The complexity within the business environment is clear, regardless of region and industry. That requires a style of **leadership that is adaptable** and open to this challenge, but also very importantly, willing and able to **communicate and listen**. Never has this been a more significant requirement from leaders.

There needs to be an **appetite and ability to cope with risk** from our leaders and while there were always some sectors and markets that required this more than others, we are seeing this becoming a more **normalised expectation of leaders**.

Takeaway moment.

Practice is the best teacher!
What are companies around the
world doing to face challenges?

- Employing agility and thoughtful and strategic planning to address risks.

- For successful international expansion tailoring products and services to specific markets, establishing local relationships.

- Scenario planning and risk mapping for organisations adapting to challenging markets.

- Establishing an in-house development program which encompasses cultural identity, competency set, performance evaluation system, career paths, and succession planning, contributing to the nurturing and retention of top talent.

- The initiation of a global subscription model for products.

- Diversifying business operations to reduce dependence on the one economy by reallocating capacity from less-demand areas to those with higher demand.

In summary, the collective **insights** derived at a **senior leadership level globally**, **combined with our extensive interactions through daily client meetings and engagements with Panorama's leadership experts**, demonstrate a consistent narrative of **transformative shifts in business paradigms**.

The survey reveals that companies are actively in *'switch mode',* necessitating more resource on measuring. Also, the **paramount role of people** in this transition is underscored — fostering comfort with change requires education of staff on its benefits.

Leaders are **increasingly adopting a more horizontal approach**, acknowledging vulnerability, and highlighting the significance of listening. Despite their own human struggles, leaders recognise that vulnerability strengthens collective resilience.

The importance of **knowing, training, and acknowledging people is vital**, as they are the agents of change.

In our day-to-day interactions with clients and peers in the Panorama community, working with companies of all sizes, regions, and sectors, we **consistently witness and address these evolving dynamics**.

Addressing the pivotal question that initiated this survey—**Are we evolving in the right direction?**—our comprehensive analysis of responses leads us to conclude that companies are **indeed steering towards a more collaborative culture**, embracing innovation and incorporating this into strategic planning. They are actively **looking at risk and adopting an agile approach to change**.

The most significant lesson is **the power of action over words**, coupled with the **crucial role of technology** in helping to shape the future of companies and teams.

Reflecting on your own culture is pivotal for success on this journey. **The key lies in knowing how to ask the right questions for your context**.

Rest assured, you can rely on the Panorama community and its leadership experts for guidance.

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