Rewiring service delivery
- *Agile globalisation*

February 2021

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Introduction

The future is here!

Over the last few years, organisations around the world have been trying to figure what the future of work would look like. This question becomes more critical when we consider how globalised organisations are modeled across their global footprint. Organisations have been influenced by three major forces driving the future of work namely, ***technological disruptions, geopolitical uncertainties and workforce demographics*** and build their strategies and models accordingly. It only took a couple of months for COVID-19 to completely change the intensity of these forces as we knew them.

While organisations were preparing themselves for the future considering it was 5-10 years away, COVID-19 has accelerated this timeframe and brought us to the future already!

This means that organisations will have to reimagine the way work is done. Clearly, the future is **'Agile globalization'**

The ability to be global and agile at the same time is going to be key to staying competitive in the future – all while embracing a highly flexible enterprise architecture supported by a robust business resilience plan.

Why is it most relevant for Global Capability Centres (GCCs)?

Since GCCs and the wider vendor ecosystem together form the microcosm of a large enterprise, it is important to ensure that they are aligned with the future of work. This document is aimed at helping such organisations to reimagine their delivery strategy, enterprise architecture, workforce and business resilience plan.

Driving the need for change: Today's workplace is being impacted by many factors

1 Organisations are more global than ever

The world is more connected than in any other point in history

56% Of the total assets of the top 100 MNCs are held by foreign affiliates[1]

59% Of income is from foreign operations for the average MNC[1]

3,300+ Number of GCCs across the globe[2]

3 COVID-19 has impacted all businesses

The pandemic has had an ever-lasting impact on business decision making

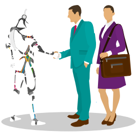
55% Of enterprise clients expected **changes in their business priorities** due to COVID-19[8]

2 There are three main forces shaping today's work

Technological disruptions

The way humans carry out work has changed rapidly due to advancements in technologies

87% Of senior business leaders say digitalisation is a priority[3]



85% of large organisations will have deployed RPA by 2022[4]

Geopolitical uncertainties

Rising geopolitical volatility and the prevalent global trend towards protectionism are impacting the current work landscape

55% Global CEOs surveyed ranked geopolitical volatility as one of the headwinds affecting them[5]

Workforce demographics

Organisations will need to add flexible workforce with the right skills

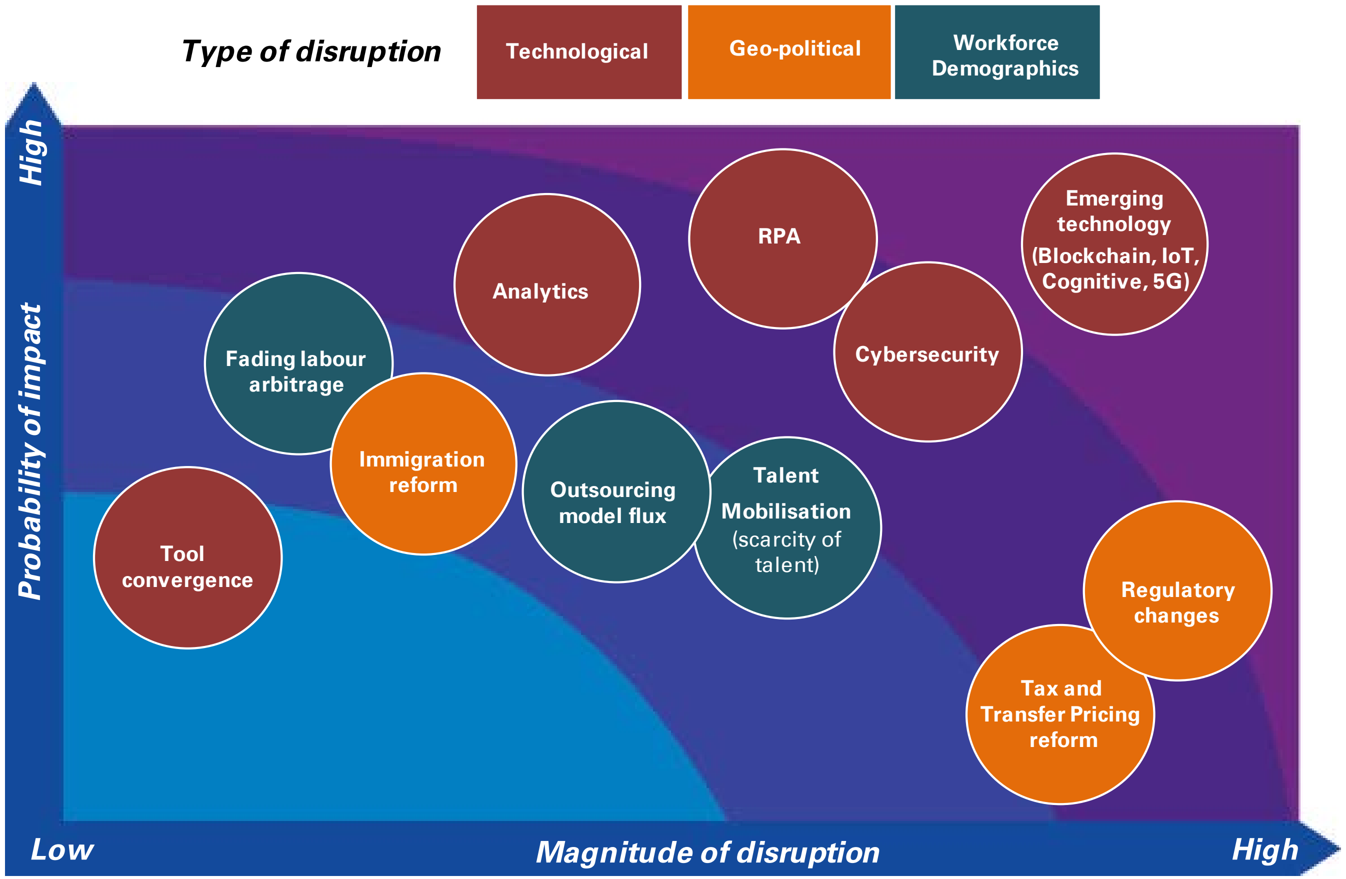
58% Of businesses reported skill transformation since the pandemic[6]

~USD300 bn Contribution of the gig economy in 2020[7]

1. The world's top 100 non-financial MNEs ranked by foreign assets 2019, UNCTAD, June 2020
2. GBS Share of Market Expands to 27%, with 54% of New Setups Focused on Digital Services, Everest Group, April 2020
3. Gartner Says Worldwide Spending on Robotic Process Automation Software to Reach $680 Million in 2018, Gartner, November 2019
4. Speed Up Your Digital Business Transformation, Gartner, January 2019
5. Chasing growth in a world with borders, KPMG, October 2018
6. Lack of Skills Threatens Digital Transformation, Gartner, July 2020
7. The Global Gig Economy: Capitalizing on a ~$500B Opportunity, Mastercard, May 2019
8. HFS' Four Phases of Paradigm Shock drives the people-powered organization, HfS Research, May 2020

This need for change is accelerating the evolution of global service delivery models….

Technology innovation, geopolitical climate and emerging resourcing trends are converging to significantly change the way in which large multinational companies operate currently



What work is done: Higher-value services
— Sophisticated data modeling and visualisation
— Innovation and new capital allocation approaches
— Analytics services and digital (RPA, AI)

Where work gets done: Increasingly location agnostic
— Virtual delivery centers/“no shore”
— Reliance on partners
— As-a-service platform offerings

Who does the work: Reshaped support structure
— Flexible more contingent workforce
— Full plug ‘n’ play, irrespective of geo or language
— Emphasis on partnerships, collaboration (crowd sourcing), and reducing silos
— High skill set employees/digital skill sets

How work gets done: Automation and integration
— Robotics and Artificial Intelligence everywhere
— Integration of back, middle and front offices
— Language neutralisation to scale, and reduce more costly nearshore regional centers
— Self-service tools

…and Covid-19 has led to short-term reactions and longer-term perspectives

The pandemic has led to four major short term reactions from organisations. All these reactions impact the future of work

Short term

Push towards digital

The pandemic has emphasised the importance of digitisation with cloud and cyber security being at centre of hybrid working models

Move towards variable cost models

Organisations will try to convert fixed costs to variable as they revisit the current strategies on in-house vs outsource

Build resilience

The pandemic has taught the importance of resilience planning – in an attempt to re-find stability

WAY FORWARD

Move to global service delivery

Placing physical barriers may not restrict global service delivery

Onboarding the right talent

Limited presence and operations may impact prospects of onboarding right talent

Glocal is the way forward

Not being Glocal may result in supply chain disruptions

Long term

1. Technological disruptions and COVID-19 have **led to greater trading of services** (service delivery is less susceptible to barriers)
2. With geographical borders blurred, companies with global presence are positioned to **easily tap into diverse global talent**
3. Extreme risk events, including pandemics, can not be dealt locally / regionally and **warrant coordinated international efforts**

GCCs and outsourcing partners are integral as global service delivery models evolve

Since GCCs and outsourcing partners together form the microcosm of a large enterprise, it is important they share a common vision for future of work

- Regional offices
- Remote offices
- Coworking space

- Start-up ecosystem
- Academia

- BPMs
- Service providers

A lot of work is done offshore

~USD211 bn

Value of services offshored to **GCCs and outsourcing partners** across the globe[1]

Emphasis on innovation

~38%

Of work carried out **by GCCs across the globe** is related to R&D and engineering[2]

‘Multisourcing’ strategy

65%

Of bigger businesses are expected to have multisourcing strategy implemented (by 2023)[3]

Co-innovation with start-ups

1,000+

Startups in a co-innovation and collaboration program with CoEs (in 2018-19)[4]

1. GBS State of the Market Report: Evolving Operating and Governance Models to Build GBS of the Future, Everest Group, March 2020
2. Global In-house Center (GIC) Annual Report 2019: Enterprises Insourcing IT Services to Their GICs, Everest Group, July 2019
3. Gartner Says Organisations Must Review Outsourcing Arrangements to Mitigate Geopolitical Risk, Gartner, November 2019
4. Industry Performance: 2018-19 and what lies ahead, NASSCOM, March 2019

The need of the hour is for organisations to adopt agile globalisation

Establishing business continuity and resilience across multiple sites is the need of the hour for many organisations. Now is the opportunity to redefine what is the core, and to realign the operating model to serve changing customer needs

Organisations should re-look at their delivery strategy by focusing on service portfolio, operating models, global location strategy etc.

a **A globally diversified delivery strategy**

b **A highly flexible enterprise architecture**

A flexible enterprise architecture entails modernizing the ways of working to facilitate rapid adoption of emerging digital technologies such as Cloud, advanced analytics, AI/ML, RPA, IoT etc.

Agile globalisation

Leaders will need to focus on the organisation's workforce, technology and supply chain in order to accelerate the path to recovery before designing strategies for future sustainability

d **Building a robust resilience strategy**

c **Embracing the workforce of the future**

The workforce of the future will involve a significant recalibration of roles with agile ways of working, and a focus on re-skilling the organisation to embrace digital technologies and remote working. HR policies will need to reshaped to enable employees' wellbeing and productivity

Key considerations for GCC leaders in view of this evolution (1/2)

01

Closer to the customer

The role of a GCC will tilt significantly towards serving changing customer needs in addition to acting as a value partner for the overall group

02

Re-aligning the sourcing strategy

GCCs will reduce their dependencies on outsourcing partners in an attempt to improve flexibility and reduce the underlying risks and take greater control in contracting decisions

03

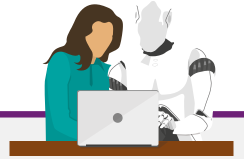
Ecosystem partners to play a vital role

GCCs will increasingly leverage external ecosystem to develop capabilities that are not core to the organisation

04

Rationalised location portfolio

GCCs will revisit and rationalise their location portfolio due to blurring of geographical boundaries and emergence of location-independent work processes



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Distributed human workforce augmented by digital workforce

Workforce mix in organisations will be altered permanently – with a highly distributed human workforce augmented by digital workforce

Key considerations for GCC leaders in view of this evolution (2/2)

06

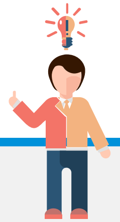
Technology-enabled employee experience

Digital technologies to play a vital role in ensuring seamless employee experience

07

Agile enterprise architecture with greater resilience

Organisations will increasingly adopt an agile architecture containing a mesh of microservices offered over the cloud, backed up by robust cybersecurity arrangements



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Reskill – the motto!

Organisations will invest in reskilling/upskilling their employees to align with the newer role of the GCC

09

Reimagine productivity and performance measurement

In a highly virtual environment, organisations will identify newer ways of measuring productivity and performance

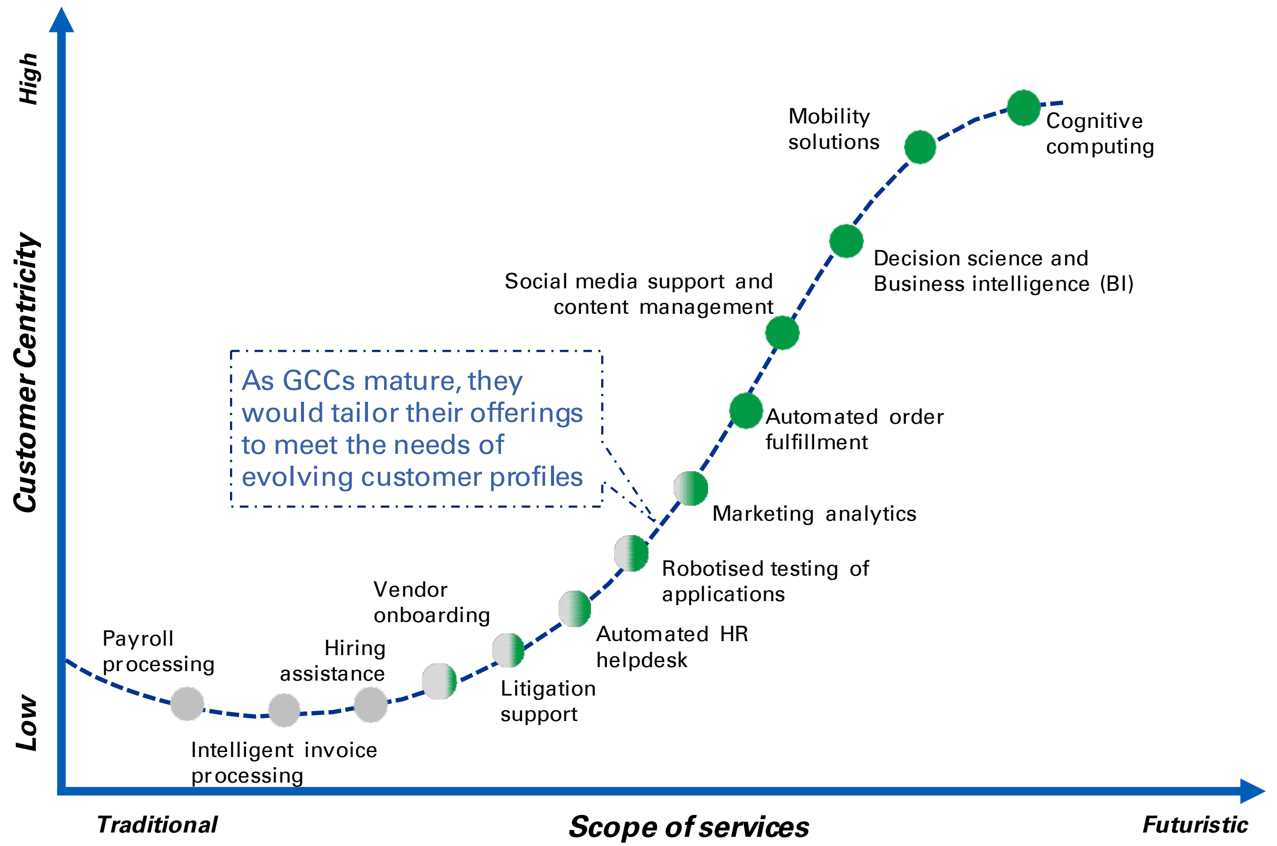
10

Risks measured dynamically

Dynamic risk assessment will take over traditional risk assessment methods to be better prepared for future business continuity situations

GCCs will enhance the **customer experience** across the business value chain and influence the front office

GCCs will leverage the established position of efficient and consistent process execution in traditional services to influence and own the overall delivery of enterprise-wide cross-functional solutions



Illustrative

GCC leaders increasingly rank customer centricity as one of their top priority and feel that improving customer experience to be a main driver of operating model change

How GCCs of the future will re-align to be more customer-centric[1]

01 **Redefine**
Increased focus on costs, agility and creating value through high-quality services

02 **Personalise**
Leverage data available for the customers to drive personalised services

03 **Engage**
Improved level of interaction and collaboration with the customer through formal and informal feedback mechanisms

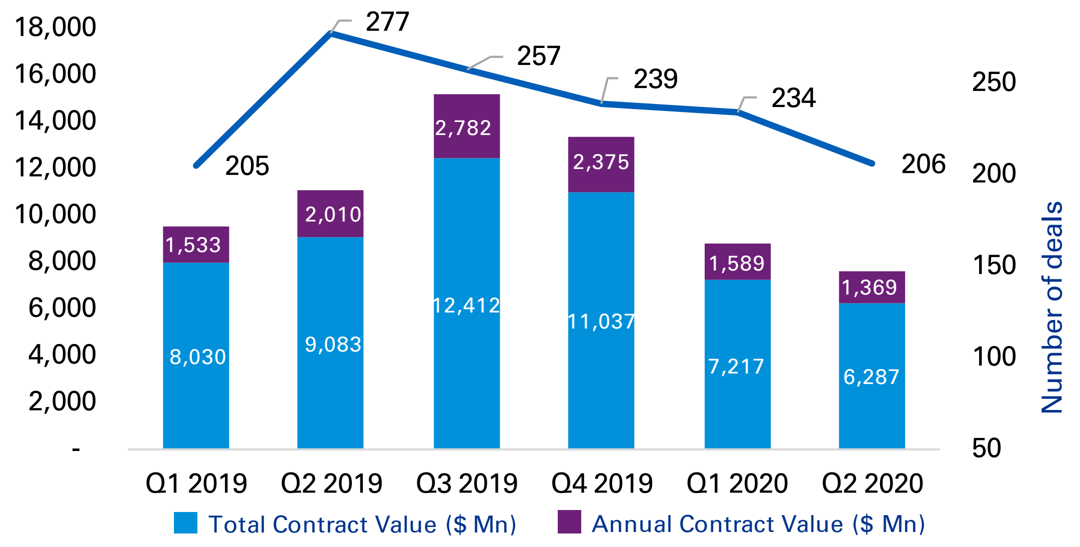
04 **Refocus**
Actively adapting the current offerings to changes in customer personas and align them with business objectives

1: Future of Work: "GBSNext"– the shape of things to come, SSON, July 2020

GCCs will **realign their sourcing strategy** to reduce dependence on partners and increase control

Organisations will shift from having a decentralised model to a more centralised model with lesser dependency on outsourcing partners in an attempt to improve flexibility and reduce the underlying risks

ITMS and BPO contracts[1]



Outsourcing trends[2]

Organisations wanting to reduce outsourcing increased

23% (2018) → 48% (2019)

Organisations wanting to increase outsourcing dropped

72% (2018) → 28% (2019)

1. ITMS and BPO Contract Analysis—Q2 2020, HFS Research, August2020
2. State of operations and outsourcing 2019, HFS Research, Dec 2018

COVID-19 has acted as an accelerator for changing outsourcing trends

Decrease in outsourcing

- Organisations will look to increase control as data protection and cybersecurity become top priority

Consolidation of partners

- Reducing risks spread across multiple vendors
- Reducing the effort to manage multiple partners

Shift to large outsourcing partners

- With higher investment on technical infrastructure, large outsourcing partners offer better resilience to disruptions

Increased contract flexibility

- Stricter clauses around adjusting the SLAs and KPIs and continuous improvement

Ecosystem partners will play a vital role as GCCs look to build capabilities for the future

GCCs will continue to partner with technology startups and educational institutions that understand the scale and complexities of large organisations to develop capabilities that is not core to the organisation

Innovation | Digital enablement | Competitive advantage

Current scenario

Enterprises → **Outsourcing partners** / **Startups**

- Greater reliance on outsourcing partners for technology enablement
- Startups preferred for concept and idea generation

Existing collaboration with startups and academia

Incubator programs	Case competitions
Digital transformation	Research agreements
New technology ideation	Training programs

Future outlook

Enterprises / **Outsourcing partners** → **Startups** / **Academia**

- Viewed as reliable and agile sources of innovation for enterprises and service providers

Nature of collaboration programs will change

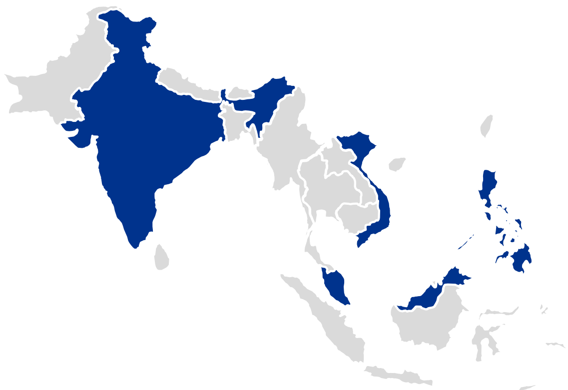
Joint solutioning	Infrastructure investment
Infrastructure sharing	Experiential learning programmes
Capital investment	Curriculum design
Channel partnerships	Center of excellence/ Research partnering

GCCs will look to **rationalise location portfolio** as service delivery becomes location agnostic...

The blurring of geographical boundaries and emergence of location independent work processes provides organisations the chance to re-align their location portfolio to become future ready and explore the anyshore model

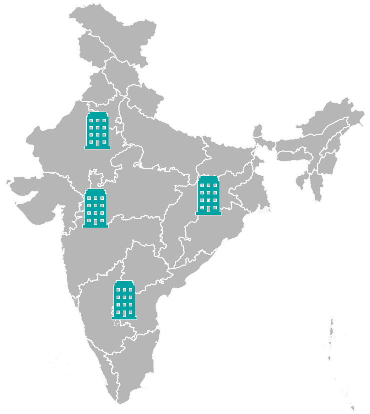
Low cost geographies to remain relevant

- India and similar offshoring hubs to retain their attractiveness
- Nearshoring to increase in the short term



Shift towards utilising satellite offices

- Transition from office spaces to collaboration centers
- Rise in the number of centers in Tier2/3 cities

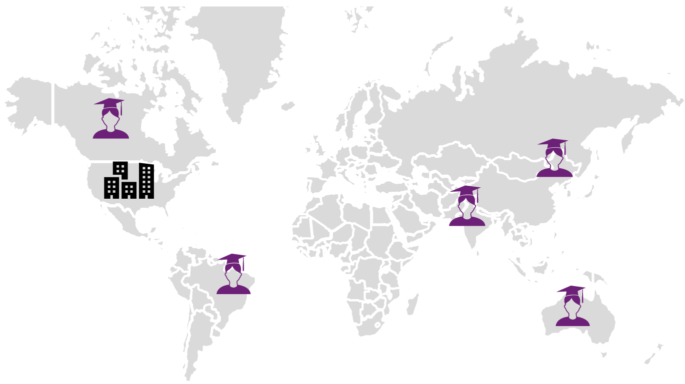


Risk hedging through global locations

- Organisations to further diversify their location portfolio
- Reduce localised risks

Borderless talent acquisition

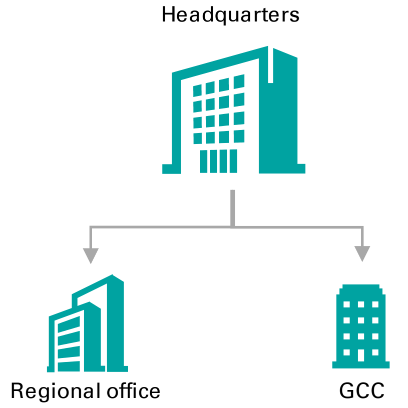
- Talent no longer tagged to the physical location of the centers
- Leverage talent from tier2/3 cities in order to get similar talent quality at reduced cost



…with the surge of remote working and hybrid workspaces coupled with a robust digital strategy

Organisations are altering the current mode of operations to bring about a permanent change in behavior of the staff to imbibe the culture of working remotely with some affiliation to a hub location, governed and enabled by robust oversight and collaboration tools

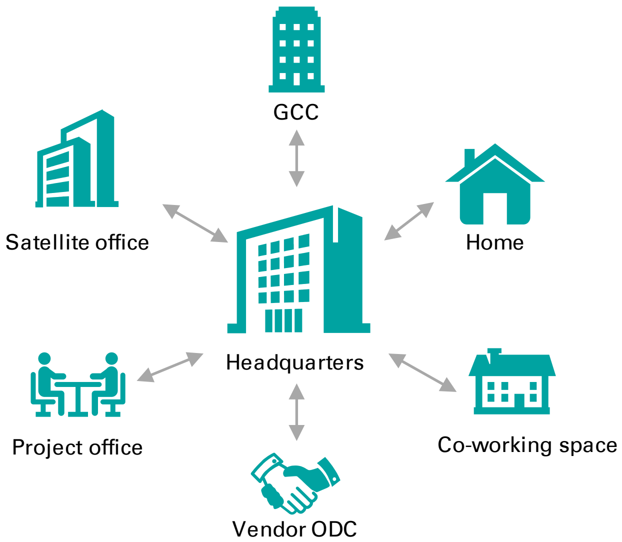
Current model



Stabilise to restart in the new reality

Maintaining productivity	Solving for fatigue
Ensuring compliance	Tool availability

Future hybrid model



Adapt to win in the new reality

Optimise virtual delivery	Sustaining performance
Asynchronous collaboration	Workplace flexibility

Technology enabling seamless connection for the increasingly atomised workforce

The "new reality" isn't necessarily a world without working in an office; it's just a world where we ***focus on the work instead of the office.***

- 77% — Employees fully productive working remotely[1]
- 70% — Feel WFH is same or better for their team's performance[1]
- 64% — Agree to have quality collaboration with remote colleagues[1]

- A well-defined **technology strategy** is the foundation work to enable the successful transition of the workplace
- Infrastructure, technology resilience, operational support model, collaboration tools and cyber security have become priority in the given times

1. Global Work-from-Home Experience Survey, Global workplace analytics, May2020

A future ready GCC will have a **renewed workforce** mix augmented by digital workforce

Workforce mix in organisations will be altered permanently – with a highly distributed human workforce augmented by digital workforce

- With newer delivery models, GCCs will move away from traditional approaches of workforce planning
- Relooking at the workforce mix also gives GCCs the opportunity for delivering value at a larger scale and at cost while also enabling deploying the right mix of skills and talent across the workforce
- This mix also provides business resilience advantages and enables highly complex collaborations that enable work to happen faster and in an efficient manner

Renewed workforce mix

Distributed human workforce

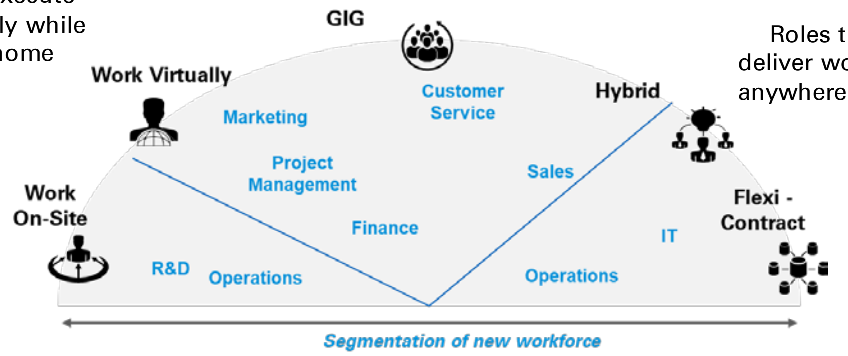
Seasonal or non-regular requirements that can be outsourced to freelancers and be paid by hours for their services

Full-time roles where employees can execute their roles remotely while working from home

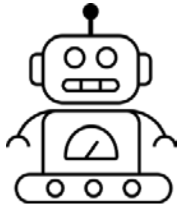
Roles that can be deliver work from sites anywhere and anytime

Full-time roles which may or may not come under essential category but have to come on-site for executing their tasks

Regular role but will lower work volume – hence could have a flexi-contract to work lesser days in a week



Digital workforce



The human workforce will be augmented by software, robots and smart machines for doing transactional/rule-based work

Enterprises have started embracing the new normal

41% of employees likely to continue working remotely after COVID-19[1]

25% of workforce to be made of GIG workers in the future workplace[2]

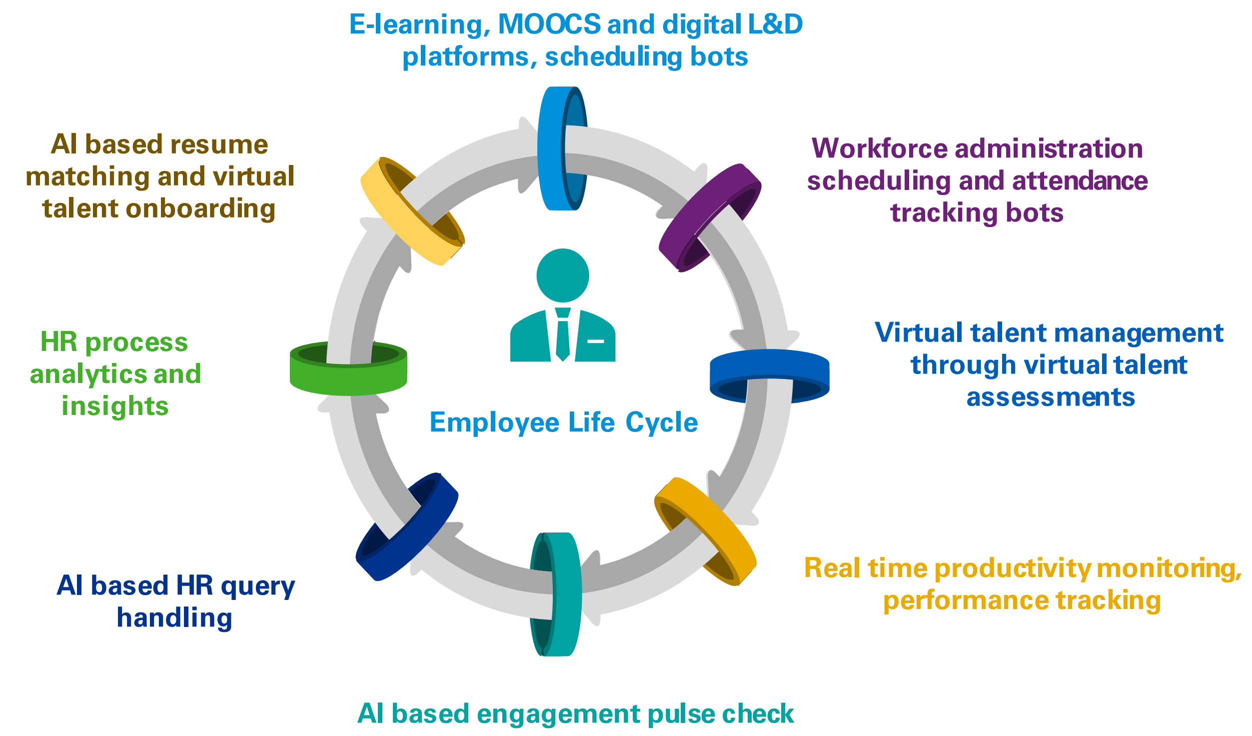
90% of large organisations will have adopted RPA in some form by 2022[3]

1. Gartner HR Survey Reveals 41% of Employees Likely to Work Remotely at Least Some of the Time Post Coronavirus Pandemic, Gartner, April 2020
2. As coronavirus makes freelancing popular, govt must make wage policies, safeguards for gig workers, Financial Express, June 2020
3. RPA is poised for a big business break-out, CIO website, June 2019

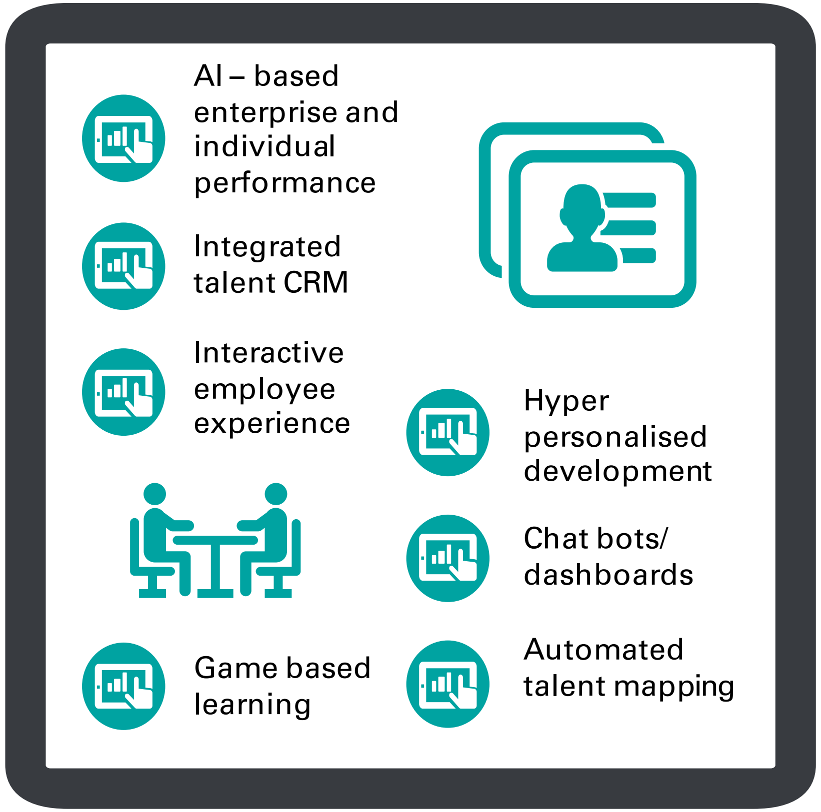
Digital and tech enablers will determine the **employee experience** as remote work becomes a norm

Organisations would need to focus on creating a uniform employee experience through the processes flows, digital touchpoints and platform interfaces across its remote and virtual workforce

Virtualisation of HR processes and Platforms enable organisations to manage service delivery of business processes at scale and reduced cost across a virtual workforce



Enablers augmented by technology



There will be accelerated adoption of an agile enterprise architecture with greater resilience

Organisations will increasingly adopt an agile architecture containing a mesh of microservices offered over the cloud, backed up by robust cybersecurity arrangements

Microservice Mesh

Middle Office Activities

Forms and document management
Service delivery
New product development
Program management and integration
Policy administration and enforcement

Front Office Activities

Customer Lifecycle Mgmt.
Digital Commerce
Employee Productivity
Demand Generation

Digital enablers

Automation | AR/VR | AI / ML | Analytics | Blockchain | IoT | NLP | Collaboration | Data Lakes | Complex Event processing
......

Cloud | **Smart Networks** | **Digital Platforms** | **ERP** | **CRM** | **Enterprise Data Store** | **IAM**

Enterprise Technology

DevSecOps | **Cyber Security** | **Remote working**

Enterprise Services

Accelerated digital transformation

59%

of organisations say the pandemic has created an impetus to accelerate their digital transformation initiatives[1]

Rise in the demand for IaaS

28%

Anticipated growth of Infrastructure-as-a-service (IaaS) between 2020 and 2021[2]

Cybersecurity to be a core focus area

68%

of organisations plan to increase cybersecurity spending due to the pandemic[3]

1. Enterprise reboot, KPMG and HFS Research, August 2020
2. Gartner Says Worldwide IT Spending to Decline 7.3% in 2020, Gartner, July 2020
3. 70% of Organisations to Increase Cybersecurity Spending Following COVID-19 Pandemic, LearnBonds website, May 2020

Employees and employers will look at reskilling/upskilling, to meet the demands of the future

Organisations will invest in reskilling/upskilling their employees to align with the newer role of the GCC

Both employers and employees realise the need to reskill

Employer

87% Of business leaders surveyed during COVID-19 crisis prefer reskilling their employees over any new hiring[1]

80% Increase in learning budget allocations of many businesses post COVID-19[1]

Employee

86% Of employees surveyed wish that their employer offered opportunities to acquire new skills[2]

83% Of employees would feel safer on the job if provided with opportunities to learn new skills[2]

Skills of the future will lead to newer job roles

- Technologies and Programming
- Cloud and infrastructure
- Cybersecurity
- Virtual project management
- UI/UX
- Change management

- Analytics Wizard
- Innovation Think Tank
- Automation Orchestrator
- Workforce Shaper
- Risk Scientist
- Cybersecurity Captain
- Process Mentor

Illustrative

1. Amid virus crisis, 87% business leaders prefer re-skilling over hiring: Report, FICCI, April 2020
2. New Study Finds 86% of Employees Around the Globe Demand New Skills Training from their Employers, UiPath, May 2020

GCCs will **reimagine productivity and performance measurement** in the new age

The need of the hour for organisations is to ensure that productivity and performance are effectively measured in a virtual environment

Organisations to provide more importance to outcomes

Effort-based

⬇

Outcome-based

- Due to constantly changing business demands and needs, there is a shift from 'Effort' to 'Outcome' based performance management

Rise of new productivity measurement factors

- **TAT of work**
- **Volume of work**
- **Occurrences of rework**

- Productivity in outcome-based performance management would be based on using a productivity matrix combining the factors – 'TAT of Work', 'Volume of Work', and 'Occurrences of re-work'.

Segmentation of roles in-line with productivity matrix

Impact on the business vs. Complexity of roles

- It is vital to conduct a baselining exercise and segment roles in the organisation into tactical, managerial, and strategic categories based on their complexity and impact on the business
- The relevance and impact of measuring productivity decreases from tactical to strategic roles

Leveraging technology to track outcome-based goals

- **Number of structured interactions**
- **Communication volume**
- **Collaboration**
- **Learning hours**

- A predominant virtual working environment would need performance-measuring technologies including deploying live tracking dashboards for performance tracking through metrics
- KPIs will differ and be relevant to the role type based on the segmentation

GCCs of the future will adopt **dynamic risk assessment** over traditional approach

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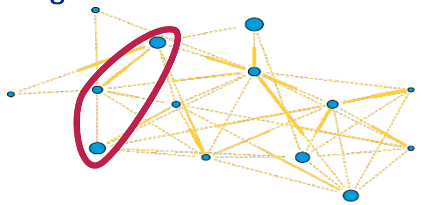
Traditional Risk Assessment Methodology

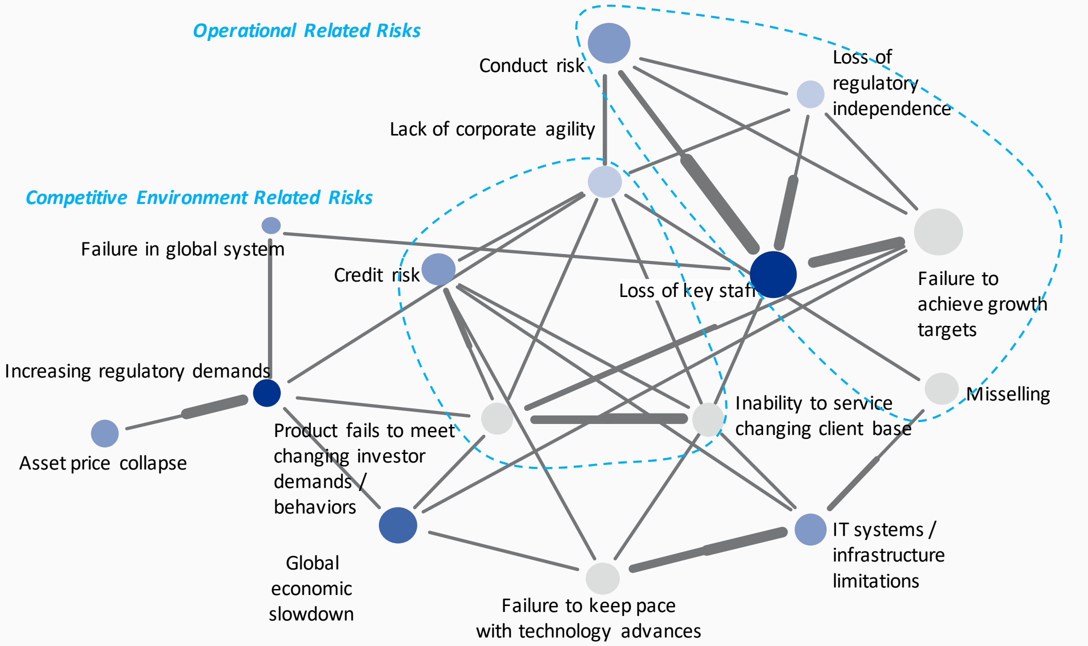
- **Assessing risk exposure tends to be difficult** as risk is unpredictable and contagious within global complex organisational structures



Certain risks are more interconnected than others in the network, forming clusters

- **Limited value and insights** in increasingly complex and globally interconnected organisations

Advanced risk modeling technique to create an interconnected risk network



Dynamic Risk Assessment Methodology

- Dynamic risk assessment expands upon organisation's current identification of risks, applies advanced risk modeling techniques
- This visualisation allows identifying of important risk clusters to provide enhanced insights and a sharpened focus on combination of risks

Dynamic Risk Assessment significantly enhance audit quality, produce unprecedented insights, and deliver superior value for our clients

KEY	Relative severity	Risk Velocity	Relative inter-connectedness
	Low, Medium, High	Immediate, Medium Delay, Long Delay	Low, Medium, High

The way forward

Are you the GCC of future?

----Legend---

- Focus areas of current GCCs
- Focus areas of future GCCs

Headquarters

GCC lead

GCC lead is now an integral part of the HQ leadership

Global Capability Centres

----Enablers----

Enterprise architecture

A highly flexible architecture that is accessible anywhere anytime

- Cloud
  - Application
  - Platforms
  - Infrastructure
- Enhanced Automation
- Virtual Workspace

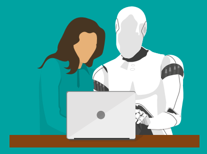
What work is done

A value partner to the parent organisation

- Business processes
- Information technology
- Digital innovation
- Customer engagement

Who does the work

The workforce composition has changed forever



Value-add work

- FTEs
- Gig worker

Transactional work

- Bots

Where work is done

Location is no longer a barrier

- Physical office locations
- Homes of employees
- Satellite offices

How work is done

The ecosystem now includes greater collaboration with startups and academia

- Traditional methods
- Automated assets
- Digital collaboration

---- Support----

Business resilience

A robust and resilient support system

- Cyber resilience
- Technology resilience
- Supply chain resilience
- Workplace resilience

Imperatives for GCC leaders to become future ready

The future of work is here, and this provides GCCs with a great opportunity to elevate themselves and identify potential areas of improvement that enables them to be ready for the next phase of growth

Front leading

Develop outcome-based measures for each service, and devise an enterprise governance strategy

Customer first

Voice of the customer, journey mapping and customer experience management

Boundary-less delivery

Building an agile and scalable delivery model focused both on operational excellence and expertise

"Plug & Play" platform

Decentralised intelligent infrastructure, transaction automation and cloud deployment

Information insights engine

Data management to drive more actionable insights, identify trends, and speed decision making for stakeholders

Agile, on demand workforce

Workforce shaping, gig workers, career latticing, learning solutions and new talent sourcing strategy

Partnerships and innovation

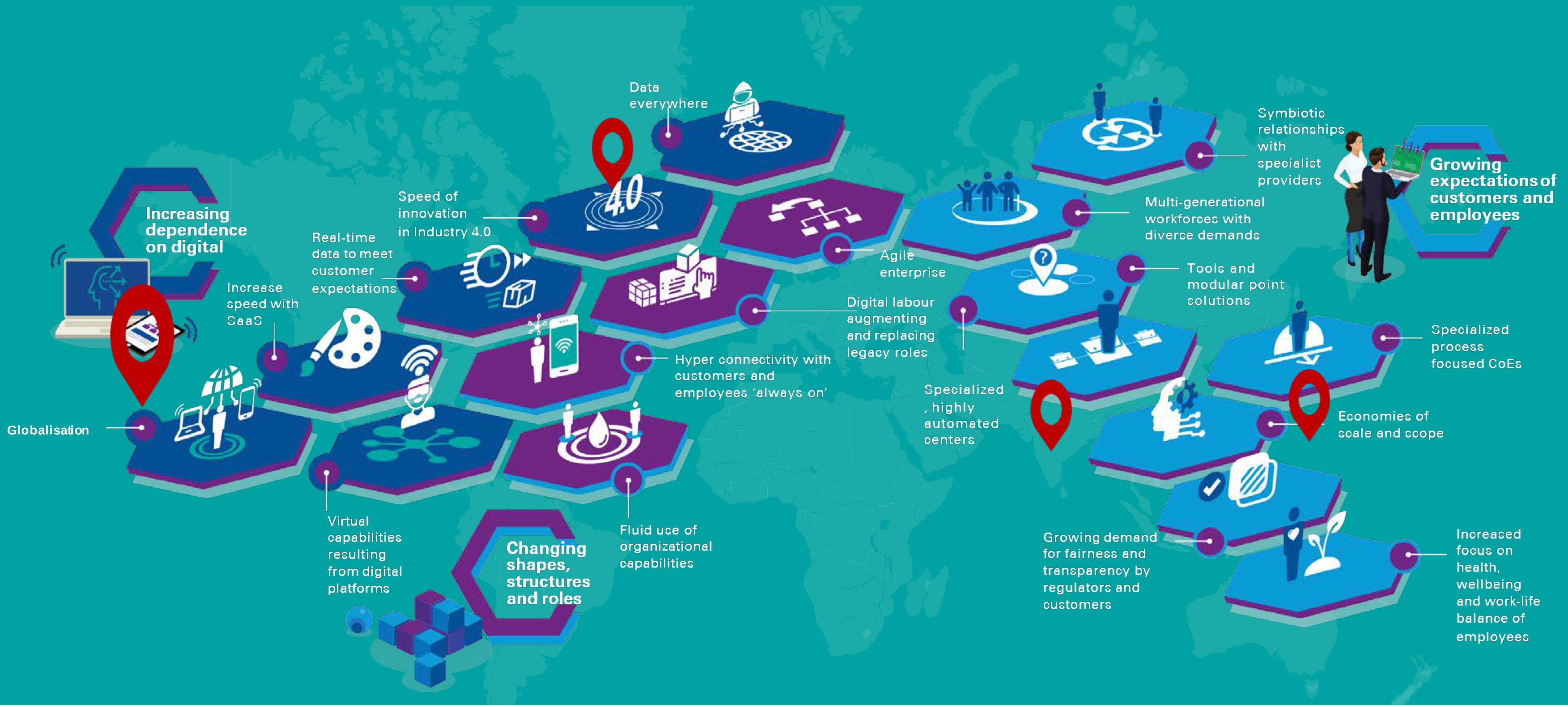
Collaboration with startup ecosystem and academia in 'trusted advisor' roles

Robust organisation resilience

Enterprise wide robust BCP strategies

Thank you

GCC of future becomes a critical plug-in to the global service delivery model



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Self-assessment guidance document for GCCs

GCC self-assessment: *Closer to the customer*

#1 Closer to the customer	1	2	3	4	
Do you manage end to end process that impacts the end consumer?	No end-to-end control for processes	End to end process control for some processes	End to end process control for most processes	Complete end to end process ownership with direct impact to end consumer experience	Not applicable
Are your GCC KPIs impacted by the feedback or experience of the end consumer?	No, KPIs currently set only for service to internal customer	Feedback important for qualitative measurement of performance, KPIs are not directly impacted	Feedback forms a significant part of performance measurement	Feedback is major part of the performance measurement system	Not applicable
What is the scope of services delivered by your GCC?	Traditional services such as Payroll, Finance & Accounting etc.	Tech implementation and basic automation	Innovation driver for the group, use of emerging technologies	Enhancing customer and user experience/ engagement, identifying customer personas and delivering personalised services	Not applicable

Legend:	Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

GCC self-assessment: *Re-aligning the sourcing strategy*

#2 Re-aligning the sourcing strategy	1	2	3	4	
Over the last 6 months, how has your relationship with vendor partner changed with respect to performance management?	Relaxed SLAs and KPIs	No change in SLAs and KPIs	Strict SLAs for few KPIs	Redefined SLAs to incorporate new ways of working	Not applicable
How has the dependency on outsourcing partners changed for your GCC?	Increased	Same as before	Slightly reduced	Significantly reduced	Not applicable
Have you witnessed any consolidation of outsourcing partners?	No. Added more outsourcing partners	Same as before	Yes. Slight consolidation	Yes. Significant consolidation	Not applicable
What is your level of ownership across vendor management /procurement management?	Governed by the corporate office	Part of vendor reviews and assessments	Part of vendor reviews and assessment and contract negotiations	End to end ownership of vendor selection, contracts and performance	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

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GCC self-assessment: *Ecosystem partners to play a vital role*

#3 Ecosystem partners to play a vital role	1	2	3	4	
At what stage are you, in terms of collaboration with start-up partners?	Yet to identify partners	Identified potential partners	Ran a pilot programme with some startup	Working hand-in-hand with select startups	Not applicable
What is your GCC's level of involvement with academia?	No ties yet	Working on an ad-hoc basis	Infrastructure investment	Well integrated and invested	Not applicable
In the past 2-3 years, have you incorporated any learnings from other GCCs through industry associations	Do not take part in discussions held by associations	Learnings are limited to the interaction between GCC leadership	Participated in some forums. Limited implementation of learnings from other GCCs	Actively participate in industry forums and frequently seek, discuss and implement key learning through industry associations	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

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GCC self-assessment: *Rationalised location portfolio*

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#4 Rationalised location portfolio	1	2	3	4	
To minimise geographic location risks, your organisation has:	Expanded onshore centers	Expanded nearshore centers	Expanded to other offices in existing offshoring locations	Expanded to additional offshoring locations	Not applicable
Is your GCC present in tier 2 / 3 cities?	Not yet present	Started evaluating tier II and III locations for offices	Either talent sourcing or establishing offices	Established presence in tier II and III locations and talent sourcing	Not applicable
How well have you adopted the hybrid workplace model?	Not adopted	Partial workforce to work from anywhere on a temporary basis	Partial workforce to work from anywhere, Yet to initiate formal work placement strategy	Defined the work placement strategy for the GCC and initiated implementation	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

GCC self-assessment: *Distributed human workforce augmented by digital workforce*

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#5 Distributed human workforce augmented by digital workforce	1	2	3	4	
What is your GCC's main purpose of leveraging freelancers and gig workers at work?	Do not intend to engage with freelancers and gig workers	To manage some ad-hoc work	Engage on a regular basis to cushion most of the additional workload	To bring in additional skills and capabilities that are currently unavailable	Not applicable
How has your working relation with freelancers and gig workers evolved in last six months?	Reduced work with freelancers	Same as before	Increased some work with freelancers	Significant increase in work with freelancers	Not applicable
If you are using RPA and bots, what value levers have you already experienced / realised:	Free-up resource bandwidth for high value work	Reduction in number of FTEs and headcount	Reduced process time and operations cost	Improved customer satisfaction	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

GCC self-assessment: *Technology-enabled employee experience*

#6 Technology-enabled employee experience	1	2	3	4	
How well are you leveraging technology enablers to enhance employee experience?	Considering leveraging tech enablers (AI, RPA etc.) at work	Started using tech enablers in simple processes	Using tech enablers in end-to-end processes in some areas (operations / employee management)	Using tech enablers across multiple areas (Ops, Employee exp, Delivery)	Not applicable

What is your centres maturity on the following parameters:

1- Systems have not undergone change since inception, most system are working in isolation with other systems
2- Systems are frequently updated, integration is not utilised properly currently
3- Systems are up to date, seamless integration across the teams
4- Data is interpreted intelligently, actively looking for opportunities to automate

Learning and development	1	2	3	4	Not applicable
Talent management	1	2	3	4	Not applicable
Workforce administration	1	2	3	4	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

GCC self-assessment: *Accelerated investments in emerging technologies and cybersecurity*

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#7 Accelerated investments in emerging technologies and cybersecurity	1	2	3	4	
In your GCC, how well are you leveraging cloud to accelerate digital transformation?	Not adopted	Evaluating for immediate deployment	Currently implementing	Extensively leveraging	Not applicable
With organization more and more s adopting AI, how is your GCC embedding AI capabilities?	Not in the next one year	Evaluating for immediate deployment	Currently implementing	Extensively leveraging	Not applicable
In your GCC, how well are you integrating Intelligent Automation with your business capabilities?	Not adopted	Using IA in simpler solutions, such as chatbots	Using IA extensively for business decision making and other areas	Offering IA and analytics as a service to customers	Not applicable
How do you define your GCC / organisation cyber security budget in the past year (vs previous year)?	Reduced to offset lower revenue in current situation	Same as before	Increased spend as planned earlier	Significantly increased spend (to strengthen GCC asset and data protection)	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

GCC self-assessment: *Reskill - the motto!*

#8 Reskill – the motto!	1	2	3	4	
What is your GCC's approach towards reskilling employees?	No separate change from our annual L&D plan	In process of identifying new skills relevant to the new ways of working	New skills identified, in process of creating functional training modules to reskill employees	Implementing reskilling programmes to bridge critical skills gap for employees	Not applicable
Have you done an assessment of current skill inventory to identify needs for the skills of the future?	No assessment done to map the current skill inventory	Mapped skill inventory for some processes/ functions.	Mapped skill inventory and identified skills required for the future	Mapped the skills required for the future and created a plan for hiring / skilling	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

GCC self-assessment: *Reimagine productivity and performance measurement*

#9 Reimagine productivity and performance measurement	1	2	3	4	
With the shift in 'major work from office' to 'work from anywhere' model, how has your performance evaluation approach evolved?	No additional tracking in place	Effort based tracking, such as punch-in and punch-out timings	Identified and started re-engineering traditional performance management	Implemented outcome-based performance management system	Not applicable
What kind of productivity measures are applicable to your GCC organisation?	Productivity measured as per output and results	New Productivity measures developed as per factors such as quality / TAT / volume etc.	Productivity metrics moved to a role-based model in pilot stages	Role based productivity measurement augmented by technology	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

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GCC self-assessment: *Risks measured dynamically*

#10 Risks measured dynamically					
	1	2	3	4	
How has your GCC organisation's risk management system evolved over the past 6 months?	No additional measures taken	Revisited and identified areas of improvement	Acted on improvement areas to the existing risk management system	Revamped the existing system to adopt dynamic and advanced risk management system	Not applicable
In terms of business continuity, select all the options that are applicable to your GCC organiation?	Various digital tools and applications are leveraged for tech resilience	Identified alternative suppliers and mitigated supply chain disruption	Strengthened IT infrastructure to counter extreme cyber hostility	Physical workplace safety is completely revamped as per the new normal	Not applicable

Legend: Future readiness score to be measured on a scale of 1 to 4 with 4 being high on future ready and 1 being relatively low

GCC self-assessment score summary

GCC future readiness score - Overall

100-120	Future ready
70-100	Not Ready as yet, but on track
50-70	Some additional initiatives required to be on track to become future ready
30-50	Need to undertake significant initiatives
<30	Need to alter and align GCC strategy towards being future ready

Thank You

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