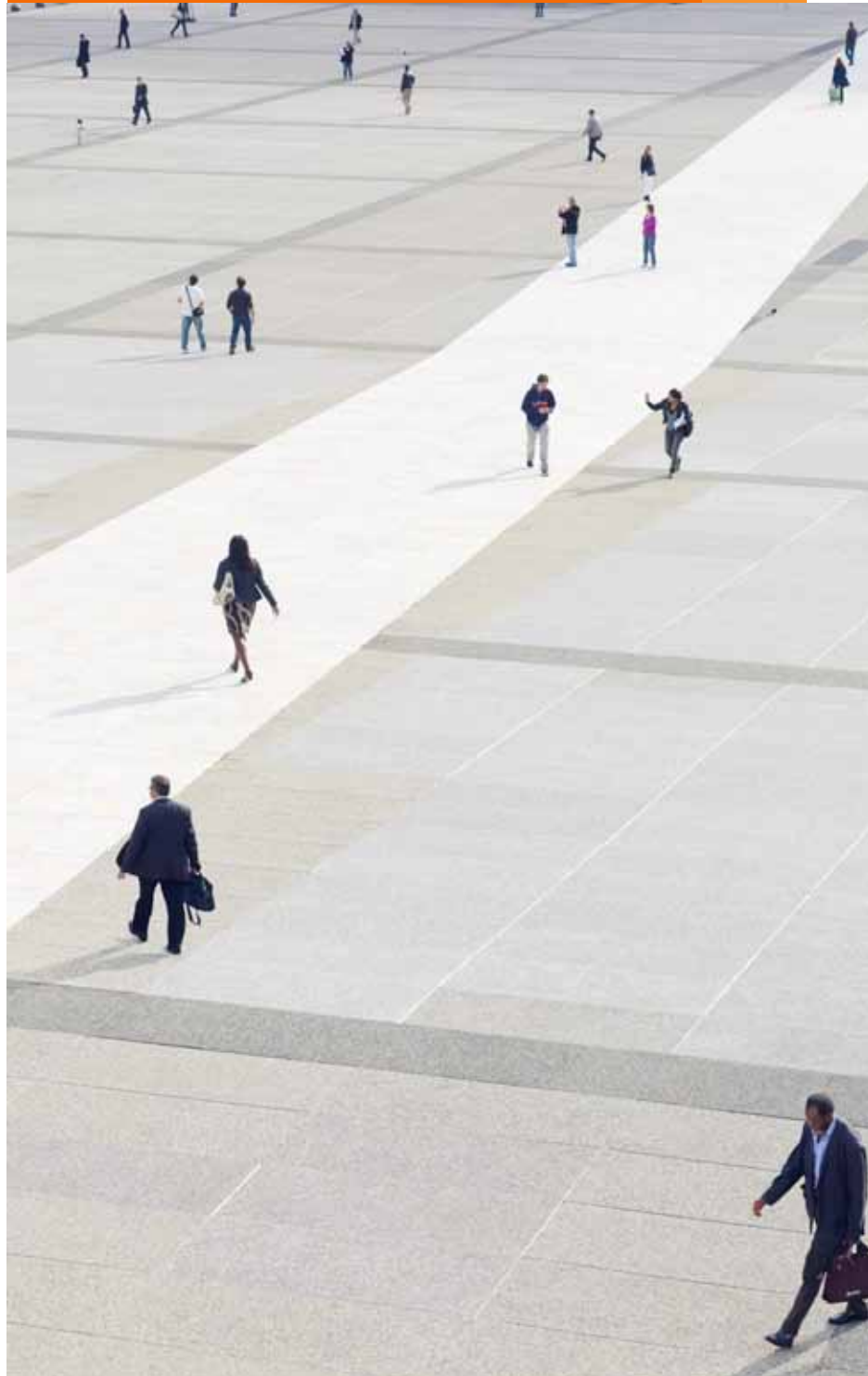


6th Annual Digital IQ Survey

Embracing the change

The India story



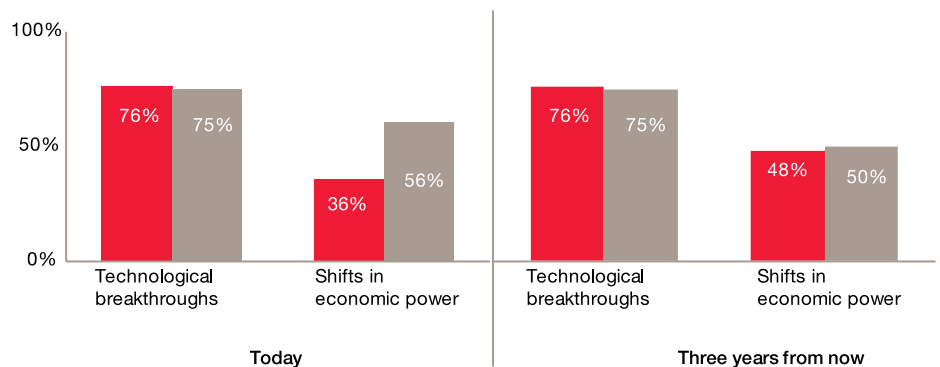
Digital India

Our survey suggests the following key trends demonstrated by companies in India:

- The new CIO as a strategic partner
- Mobile technology used significantly in customer interaction
- Analytics playing an important role in giving meaning to enterprise data
- Companies investing in virtual meeting and collaboration technologies, private cloud as well as digital delivery of products and services
- Growing realisation of the importance of digital innovation

India is harnessing the power of the digital to drive productivity, profitability as well as the competitiveness of its industries. Digital IQ, defined as a company's ability to understand technology and leverage its benefits, of Indian companies is on the rise with a growing awareness of how to weave the digital into the fabric of the organisation.

Q. What impact is each of the following megatrends having on your organisation now and what is the impact you anticipate it will have three years from now?



Base: India
Source: PwC, 6th Annual Digital IQ Survey, 2014

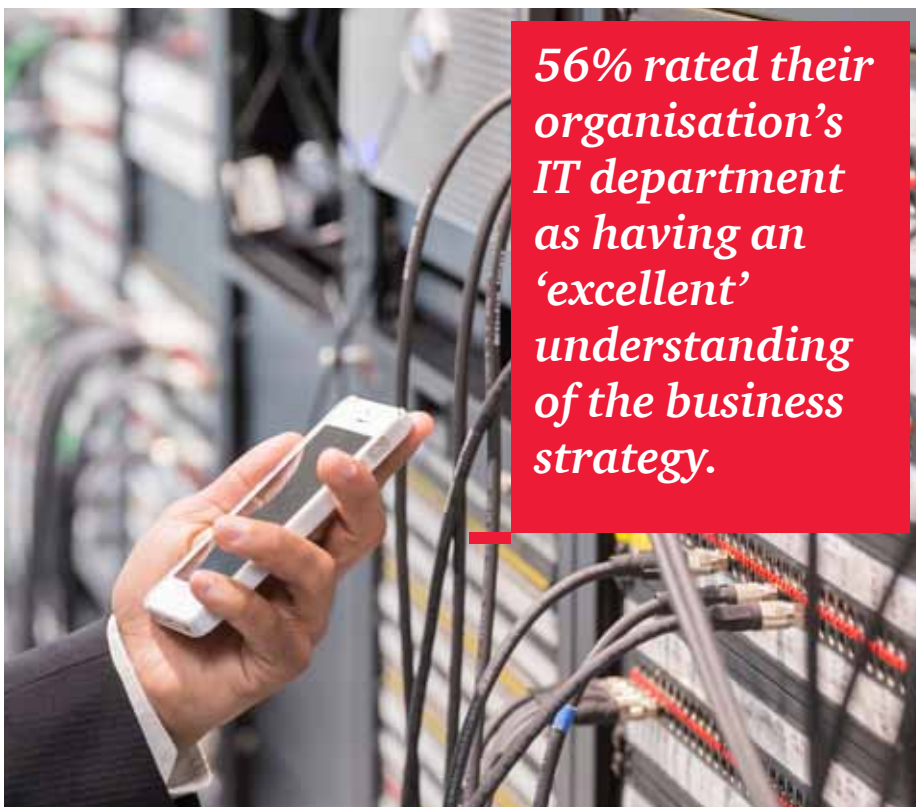
The new CIO: A strategic partner

CIOs are now bridging the gap between strategy and operations in an organisation. In their new role as strategic partners, they help understand how to realise strategies and drive business transformation.

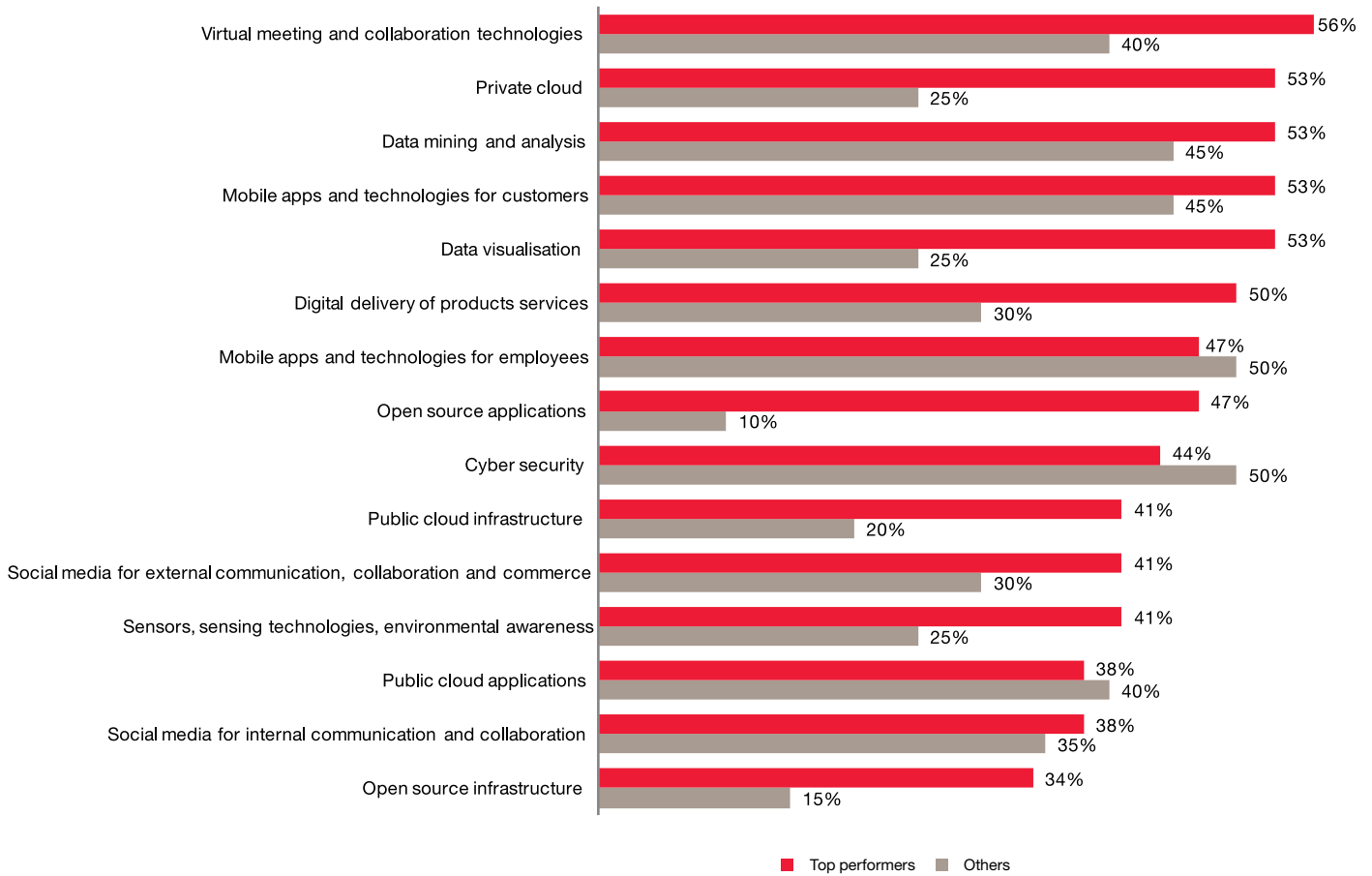
Enablers of the digital era

While developing a comprehensive strategy around the manner in which technology is to be used to catalyse business innovation as well as for ways to achieve the best possible results from it, companies need to have a clear understanding of the enablers of the digital era.

Companies in India are increasingly investing in virtual meeting and collaboration technologies, private cloud, data mining and analysis, mobile applications and technologies for customers, data visualisation and digital delivery of products and services.



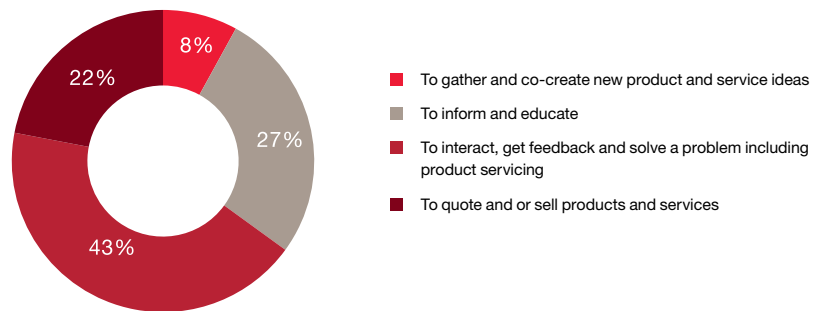
Q. Which of the following technologies are you currently investing in?



Base: India
Source: PwC, 6th Annual Digital IQ Survey, 2014

Our study also revealed that companies preferred to interact with customers mostly through mobile applications, mobile-friendly websites and mobile e-commerce. After all, with an increase in smartphone sales and mobile internet usage in India, mobility solutions are gaining ground as a dominating multi-channel customer engagement platform for loyalty and brand management. Further, with concepts such as BYOD (bring your own device) providing access to enterprise data through mobile devices, the workforce has been enabled to conduct business anytime, anywhere. This has ensured business continuity and is driving efficiency and productivity.

Q. How would you characterise your approach for interacting with customers using mobile technology? Is it mainly?



Base: India
Source: PwC, 6th Annual Digital IQ Survey, 2014

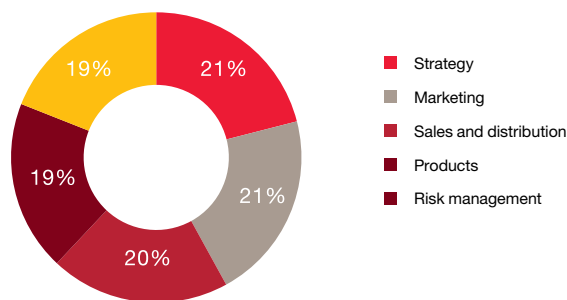
The volume of information generated through engaging with technologies such as social media and mobility tends to pose a challenge for businesses in terms of managing this data. In our survey, approximately 75% respondents agree that 'moving from data to insight is a major challenge'.

This is where analytics is useful. It gives meaning to the enterprise data by culling out information from large data sets and making it transparent and user-friendly in order to generate the right kind of insights for companies to perform better. In an ever-changing market scenario, big data analytics presents an enormous opportunity for businesses looking to differentiate and yet be relevant in the current environment.

Digital innovation: The road to the future

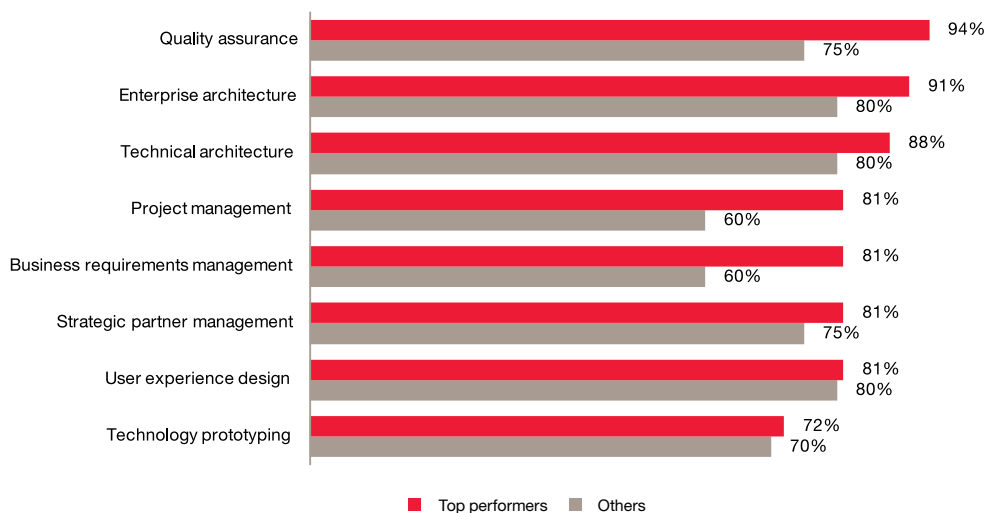
Our analysis indicated that companies in India are realising that it is essential to have a digital capability woven throughout the organisation rather than considering it as a centralised function operating in a silo. This change is being led from the top.

Q. To what extent is your organisation utilising analytics in each of the following business functions?



Base: India
Source: PwC, 6th Annual Digital IQ Survey, 2014

Q. How would you rate your organisation's IT department on the following skills needed to integrate digital capabilities into your core businesses?



Base: India
Source: PwC, 6th Annual Digital IQ Survey, 2014



Things to consider before embarking on the digital journey

Strategy

- Does the organisation have a digital strategy that considers every dimension of its business and every possible digital opportunity with its respective challenges?
- If an organisation has defined its digital strategy, is there clear direction from the top on the roles, responsibilities, accountabilities and governance mechanisms for executing the strategy?

Structure

- How is the digital capabilities structure defined and designed within the organisation to ensure that the right decision-makers and people with the right skill-sets are engaged throughout the entire process?
- Is there a review mechanism in place for each of the major planned and in-flight initiatives to look for opportunities in order to get each other's perspectives and revise priorities, plans and involvement?

People

- Does the organisation have a single view of the digital skills required to meet its business goals?
- Does a common talent and skills framework exist within the organisation to identify gaps or overlaps in its skills inventory and to manage and develop those in digital roles, regardless of where they reside in the organisation?
- Does a digital sourcing strategy exist to determine which skills and capabilities should be the organisational core competencies and which will be provided by third parties?

Process

- Is there a process in place within the organisation to evaluate current project delivery approaches, processes and success rates?
- How can agile processes be adopted for digital technology initiatives?
- What type of multi-disciplinary teams will be required in this regard?
- Does a well-defined process exist for innovation prioritisation and filtering based on business priorities?

Technology

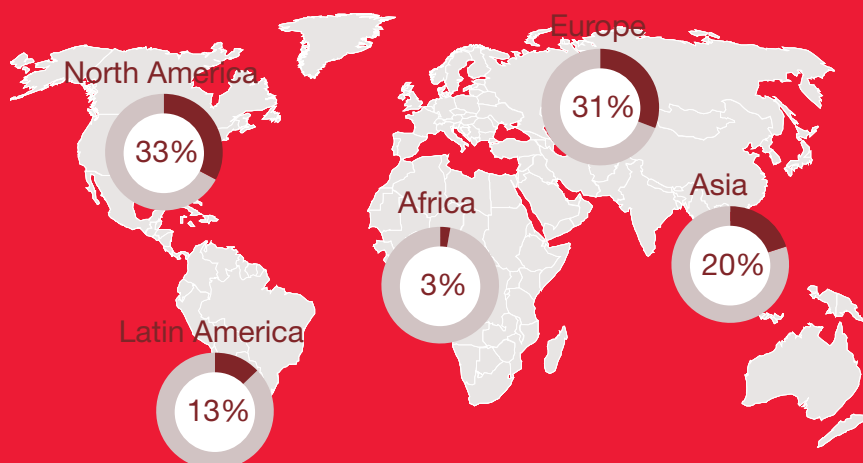
- Does the organisation have an IT strategy and enterprise architecture that considers the increased demands of the new and emerging digital channels, its mobile workforce and partners, third-party data, new analytics requirements, and cloud-based business and technology services?
- How is prioritisation of investments done around emerging or disruptive technologies?
- Does it also consider potential threats that may come from new ways of working and doing business, especially the use of third-party services and data, and prepare an effective response?

About the Digital IQ Survey

PwC's 6th Annual Digital IQ survey was conducted in the fall of 2013. The global survey included 1,494 respondents from 36 countries.

Answers were aggregated into five regions and 11 industries. Respondents were evenly divided between IT and business leaders. Two-thirds of respondents work in organisations with revenues of 1 billion USD or greater and 37% have revenues greater than 5 billion USD.

Global survey respondent breakdown
Percent of respondents by region



Notes

www.pwc.in

Data Classification: DC0

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