Bridging the Digital Execution Gap

Keeping pace with customer expectations, technology advances, and a fast-moving economic landscape

NETCEL Optimizely

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Contents

Foreword

Welcome to our 2024 report, *Bridging the Digital Execution Gap*. The concept behind this report, which comes two years after we published *From Digital Transformation to Digital Evolution*, came from the realization that many organizations are still struggling to turn their digital ambitions into tangible, measurable benefits.

In today's rapidly evolving digital landscape, the gap between customer expectations and digital experience execution has become a critical challenge for organizations worldwide. As digital leaders navigating this dynamic environment, we've all witnessed first-hand the complexities and opportunities inherent in bridging this gap. In this report, we delve into the multifaceted factors contributing to this phenomenon and explore strategies for effectively addressing it.

When writing the foreword for the 2022 report, we were coming through a period of intense digital acceleration partly as a result of the pandemic. Today we see that respondents are coming to terms with the impact and opportunity of data and AI, the broader role of technology, changes in organizational cultures and ways of working - all set against an uncertain geopolitical picture in Europe and beyond.

To paraphrase Pericles, 'the key is not to predict the future, but to prepare for it', and we see this reflected across this report as there is a strong theme around building capabilities across such areas as insights gathering, data and AI, digital marketing operations and effective measurement of ROI.

Capabilities need to be matched by a set of technical and process tools to deliver the speed and agility necessary for operating in today's world. To truly attempt to bridge the digital execution gap, one needs to robustly prioritize activities and be able to deliver shorter time-to-market and time-to-value on a platform that is composable and flexible enough to grow and evolve with the digital needs of today and those emerging tomorrow.

Building a capability -based approach like this enables us to identify the challenges and opportunities the future may bring, and to be able to meet these with clarity and confidence. We chose a digital career path as one of adventure and pushing boundaries, and never has it been more exciting.

We hope you enjoy reading this report and find it genuinely useful in reflecting the challenges we all face in delivering amazing digital experiences to our audiences. If you have any views on any of the topics raised, we warmly welcome you to join the conversation as part of our network of digital change makers.

We would love to extend our deepest thanks to our partners Optimizely and London Research for making this report possible, as well as to the expert contributors and commentators who offered their valuable insights and advice. We also want to thank everyone across the world who gave their time to provide responses to our questionnaire and share their experiences and perspectives.

Dom Graveson
Strategy Director

Justin Masters
CTO

Netcel

Executive summary

Research published in 2022 by Netcel and Optimizely, also in partnership with London Research, documented how the digitization of business processes was now widespread across most sectors; but it also showed how many organizations were still struggling to operationalize and execute against their strategic digital vision.

This year we focused on the digital execution gap this is creating between what customers and other stakeholders expect, and what the organization is actually able to deliver.

Our hypothesis was that the gap is driven by uncertainty and deficiencies relating to strategic plans, the user experience (UX), technology and tools, people and processes, and how data is used to measure and deliver high-performing digital products.

The research confirmed the existence of the gap, with almost three-quarters (71%) of respondents acknowledging a gulf between the digital experiences customers expect and the ability of companies to meet those expectations. It also found:

- Businesses are still more likely to think about digital transformation in terms of improving their overall technology infrastructure (73%), rather than the ongoing evolution of the business to capitalize on digital opportunities (59%), or changing organizational culture and behavior so technology can be embraced (46%). In other words, they're still thinking about digitizing the business, rather than becoming a digital-first business.

- This persistent sense that digital transformation is purely a matter of technology is reinforced by the fact the CTO is still seen as the executive with the most influence over digital initiatives (48% compared to 51% in 2022).

- AI has very much become part of the digital journey, with two-thirds (67%) of respondents saying that AI enablement is part of their digital transformation. This compares with three-quarters (73%) who said the same about improving their overall technology infrastructure (the most popular choice).

- The major barriers to evolution as a digital business are lack of funding (reported by 32%), lack of alignment between teams (31%), lack of know-how, skills and capabilities (also 31%), fragmented data and unreliable reporting (29%), and poor technology infrastructure (28%). The percentage of businesses reporting these as barriers increased in every case.

All this needs to be seen against a backdrop of political and economic uncertainty, climate breakdown and falling customer confidence. The research showed businesses hunkering down and focusing on retaining customers, becoming more sustainable, and reducing costs as their three highest priorities.

The exception to this familiar list of responses to tough times is the fascination and fear being caused by AI.

- A striking 42% of respondents strongly agree they're not only using the technology, but are also seeing the promised efficiencies. Over a third (37%) strongly agree they were early adopters of AI and are now using it across their organization. And a third (34%) strongly agree they no longer view AI as 'hype' and have embedded it firmly in the business.

"Any CTO who has been in tech for the last 10-15 years knows with absolute certainty born from experience that digital transformation is a perpetual journey, not a destination. There is no check box that says 'well done, you've done it' – this is an ongoing process. AI is an integral part of this continuous evolution, and leaders must prioritize bridging skills gaps and fostering a culture of continuous learning to adapt. An agile, beginner's mindset is essential because everyone is on this learning journey together, and success will come to those who encourage experimentation and allow their teams to fail and learn. This report underscores the necessity of these approaches with concrete examples and robust data. Crucially, this report highlights that agile mindsets start with people, not infrastructure. Worryingly though, the stats show that businesses are still looking to enhance their technology infrastructure rather than change organizational culture to fully embrace technology. This is a call to action for change in that direction."

Tamara Lohan
Founder and CEO, Mr and Mrs Smith

Metrics emerge as a key area of concern.

- Over half of respondents (52%) strongly agree they have baseline metrics in place that show the impact of their digital initiatives. Slightly fewer say they can map digital spend to ROI, or attribute impact on the organization to the value of each digital outcome (49%). Slightly fewer still (46%) strongly agree they are focused on measurement as part of a test-and-learn approach, hinting that the agile, evolutionary model of the digital-first business is perhaps not as widespread as claimed.
- Looking at the metrics in use, things have changed little since the 2022 report. The most important is customer experience, followed by operational efficiencies, added to this year's survey. Revenues, customer loyalty, and cost reduction make up the rest of the top five. All this suggests that organizations are still not focusing enough on digital as a driver of business success. A business doesn't need a good customer experience for its own sake; it needs a good customer experience to deliver on a business outcome.

In summary, businesses are still not rising to the challenge we set out in 2022. We argued they need to stop thinking in terms of 'digital transformation' – a procedure with a defined point of completion – and start aiming for 'digital agility' – a state of readiness to respond quickly and effectively to changes in market conditions, customer behaviors and technological development. The result is this growing gap between what customers expect and what businesses can deliver.

Methodology and acknowledgements

We carried out a global survey of more than 300 organizations with annual revenues of at least $50m. All respondents had some degree of responsibility for digital transformation, digital evolution, or digital initiatives. Half of respondents were from the IT function, while the other half were from other departments including digital, data, operations and marketing. Over the same period, we also carried out a series of interviews with consultants and practitioners.

The authors would particularly like to thank the following for their contributions:

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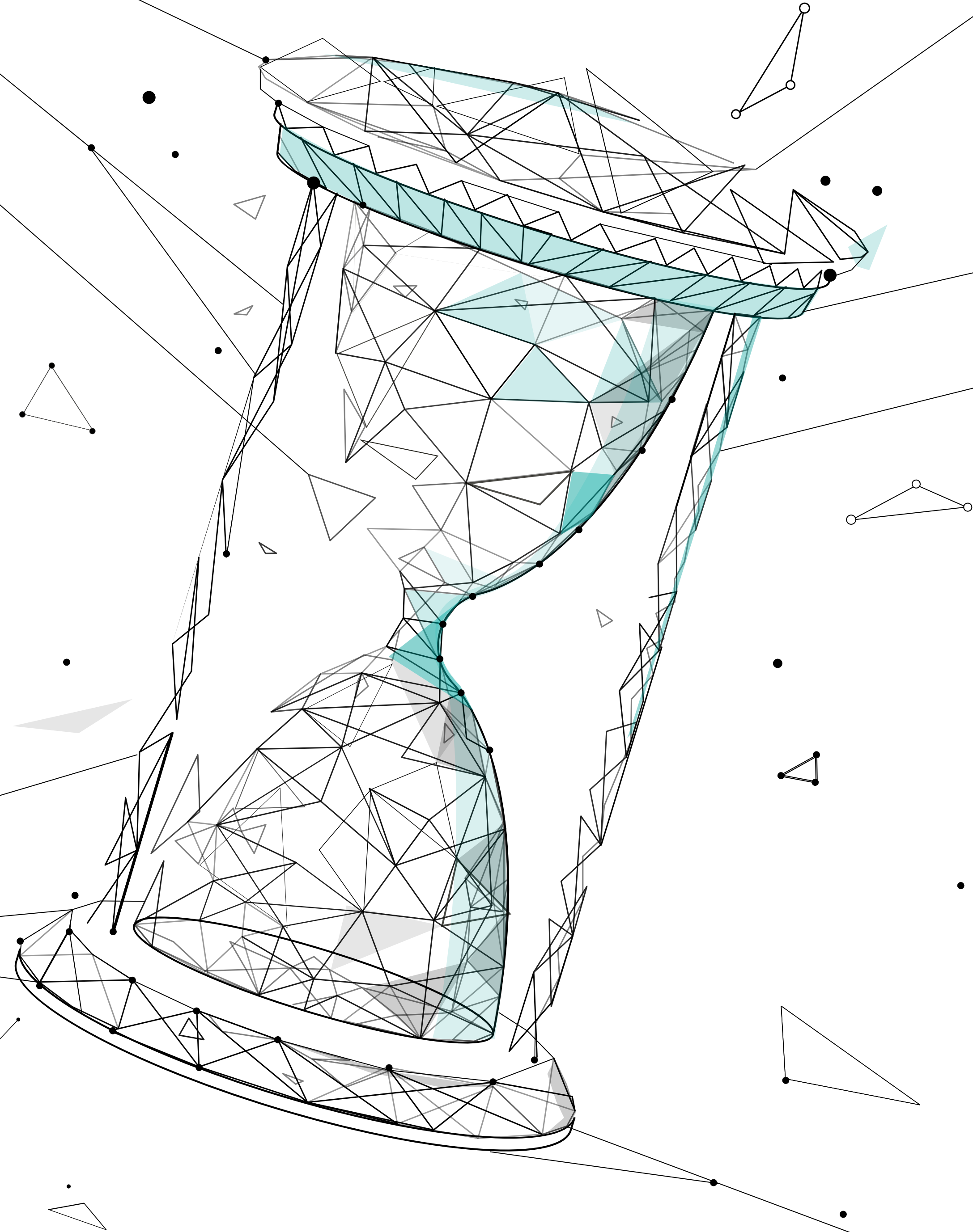
Section 1

Introduction – What’s changed since 2022?



“Becoming a 'digital business' means being able to operate effectively in environments of high uncertainty. Digital transformation is not a journey from A to B, but instead a transition to a new operating system which in itself is characterized by continuous change.”

Neil Perkin
Digital Consultant and Author of Agile Marketing

“This is a fascinating glimpse of how important digital has become, and how businesses are struggling to keep up. You could label this digital inevitability – like how electricity went from innovative new tech to invisibility.”

Simon Andrews
Publisher, Fix Newsletter, and Board Advisor

“Companies typically think their ‘digital transformation’ is complete, but they are often only talking about systems and processes. These are ‘digitized’ rather than truly digital businesses.”

This is how we summed up the results of the survey we carried out with London Research in 2022 (published as From Digital Transformation to Digital Evolution: Survival of the Quickest), and on which this report builds. Our hypothesis then was that the term ‘digital transformation’ had become so devoid of meaning as to be totally unhelpful. Instead of thinking about the development of the business as a process with a beginning and an end, at which point it would be ready for whatever the future might throw at it, we suggested that the goal of management should be to achieve ‘digital agility’. This state of preparedness would allow the business to evolve swiftly and with minimum disruption to respond to and take advantage of technology-driven changes in customer demand, competitor behavior and internal business processes. This led to our focus on the principle of Digital Evolution in our 2022 report.

This involves taking a capability-based approach to thinking about the future. Instead of planning for mid- and long-term eventualities that are all-but impossible to anticipate, leading organizations are focusing on building toolkits across research, insights, UX and design, and technology. These modular approaches provide flexible options to respond to a rapidly changing and dynamic future. That’s Digital Agility.

And there is further evidence in the results of our survey that there’s more to digital success than just technology. We can look at it as the three Ps:

- **People** – teams, skills, capabilities, personalities and culture;
- **Process** – tooling, methodologies, ways of working, governance and resources;
- **Platform** – CMS, data, CRM, integration and appropriate architecture.

You can’t expect sustained success without a balanced combination of all three, but the magic comes from precisely the right blend. This will differ for every organization.

“In the face of increased fear, uncertainty and doubt (F.U.D.) organizations are sticking to what they know and chasing quick returns from operational and sales efficiency rather than the creation of new value, and business model innovations.”

Tim Ellis
CEO
The Digital Transformation People

Digital agility is not set-and-forget

However, digital agility is not a steady state, but a constant work-in-progress. Continuous improvement across the three Ps is vital for success. It’s also a never-ending struggle. It requires you to build internal capability balanced with the right external advice and support.

This is the source of our distinction between digitized and digital businesses. Digital businesses have the characteristics of adaptability, agility, and disruption in their DNA. Digitized businesses are less likely to have fundamentally changed their business model, augmented their existing ways of working with their technology, or invested in more profound change across capabilities, skills and culture.

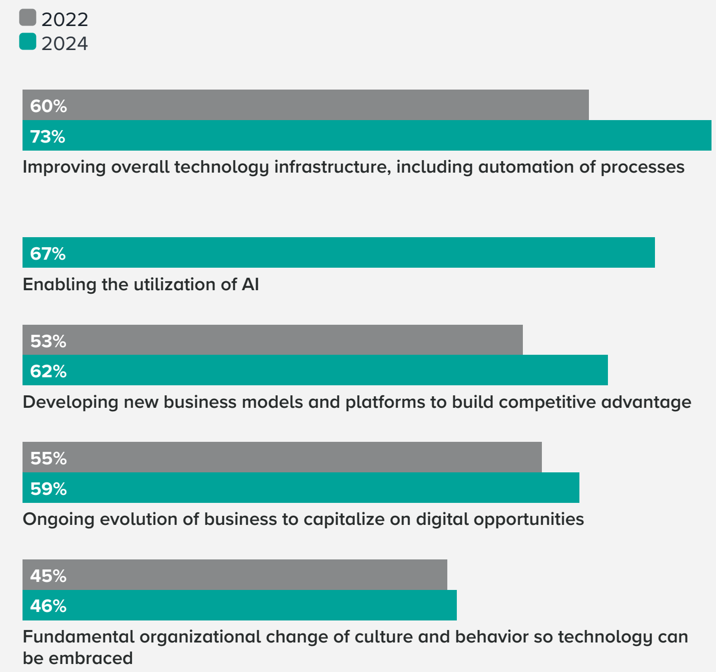
So, it was a shock to compare the results of this year’s survey with 2022 when we also asked what ‘digital transformation’ meant for their organizations (*Figure 1*). While the proportion of respondents saying that improving their overall technology infrastructure (i.e. digitizing it) is relevant to their business has increased by almost a quarter, the percentage of those saying fundamental organizational change or the ongoing evolution of the business are relevant (what we would regard as the hallmarks of building or maintaining a ‘digital’ business) has barely changed.

Of course, the big change between the two surveys has been the explosion in the use of AI. It’s not surprising to find over two-thirds (67%) of this year’s respondents saying that enabling the use of AI is a part of digital transformation that’s relevant for them.

The emphasis on the ‘improving technology’ aspect of digital transformation is reflective of market conditions. Businesses want to maximize the ROI from their technology, using it to either reduce cost or improve efficiency through automation.

FIGURE 1

When you think about ‘digital transformation’, which of the following areas are relevant for your organization?



Methodology note: ‘Enabling the utilization of AI’ was added as a new option for 2024.

Improvement of technology infrastructure is most likely to resonate as a focal point for digital transformation.

“The competitive edge will come from rapid adoption of AI for efficiency gains over and above what the later adopters can achieve, though at some risk. In terms of using AI for competitive advantage, unless you’re a provider, having AI itself is not a defensible position.”

Tim Ellis
CEO
The Digital Transformation People

This may or may not also come through AI, although that technology currently sits in the point of the Gartner Hype Cycle where it’s not quite yet able to deliver on people’s hopes and dreams in terms of operational savings.

The emphasis seen in *Figure 1* also suggests a degree of FOMO (fear of missing out); if you’re not talking about AI then you’re a laggard and will be falling behind. Certainly, views on AI broadly fall between this sense of FOMO, of competitor risk (‘What happens when our competitors effectively find a way to utilize AI?’), and a sense of paralysis around where and how to get started. The truth is that AI has been with us for years, and while it’s undoubtedly developing fast, it’s still in its infancy and shouldn’t be feared.

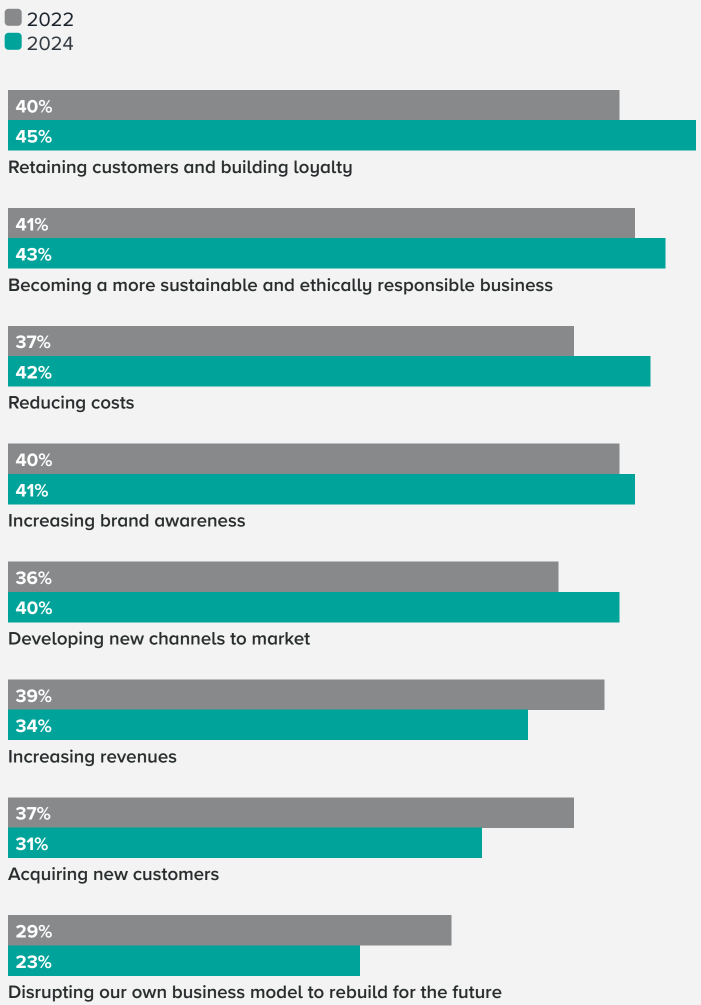
Every organization is going to need a strategy for the adoption of AI; an evaluation of where it could make a material difference to the business, whether that’s in operational efficiency or in developing a competitive edge to delight and retain customers. If they don’t, their competitors will, and they will lose position. This is what businesses need to focus on now.

The saying goes that we overestimate the short-term impact of technological innovation, and underestimate the long term. AI will almost certainly disrupt a huge number of the business models and industries out there completely in the next 20 years, and in digital more than anywhere. What does this mean? We don’t honestly know, but those who get started early will find out first.

It’s also worth stressing that, just like the internet, AI won’t ‘arrive and be done’. It will continue to evolve so businesses’ adoption, application and understanding of AI will need to be considered.

FIGURE 2

Top three most important business objectives for the next 12 months



“Unless the adoption of AI is aligned with the achievement of clear strategic ambitions and supported from the top of the organization, individuals driving AI adoption from within the organization run the risk of bearing the brunt of failed initiatives and unintended consequences of early adoption.”

Tim Ellis
CEO
The Digital Transformation People

What businesses want to achieve
Putting this into a broader business context, *Figure 2* compares what respondents rated as their top three most important business objectives for the next 12 months in 2022 and 2024.

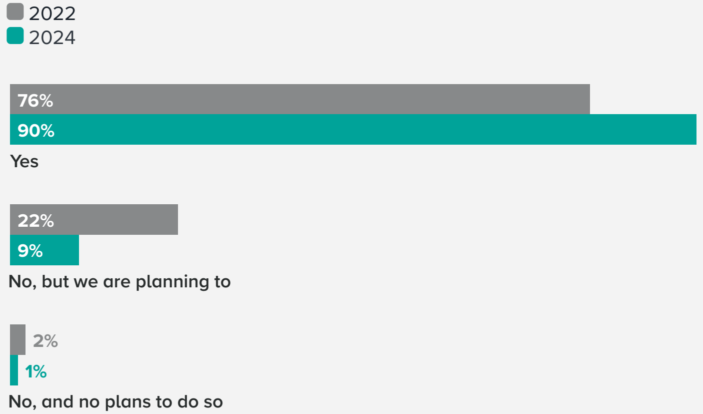
Increased emphasis on retaining customers and building loyalty (up from 40% to 45%), and reducing costs (up from 37% to 42%), and the reduced interest in acquiring new customers (down from 37% to 31%) and in disrupting and rebuilding the business (29% down to 23%), are all to be expected in the current climate of wars, inflation and falling consumer confidence. In other words, the focus is on ensuring the foundations are solid, underpinned by loyal retained customers, and supported by cost reductions to ensure the business can generate cash, squeeze into profitability, and ensure it’s positioned for growth in the future. And while it perhaps doesn’t feel like a good time to take risks, it is also a great time to build a foundation – including capabilities and flexible architecture – for that Digital Agility.

Equally, there might be a temptation towards reflection while we wait for things to become clearer. But is that what your competitors are doing? Will those who are bold now get a head start? How can you sift through the noise and find reliable signals to inform action now? Themes like customer satisfaction and retention are solid priorities that will strengthen organizations for the future.

Increasing efforts in digital transformation
Figure 3 shows that almost all this year’s respondents (90%) have formally adopted a digital transformation program, compared to three-quarters (76%) in 2022. This reinforces the idea that businesses are digitalizing their processes to drive efficiencies in a market teetering on the edge of recession. It also likely reflects 2022’s digital laggards finally getting with the program.

FIGURE 3

Has your organization formally adopted a digital transformation program?



Nine in 10 companies have adopted a digital transformation program, up from three-quarters in 2022.

“In an uncertain and challenging world, innovation will be crucial to an organization’s survival and success. In order to systematically promote innovation and evidence ‘digital agility’ it will be important for businesses to codify, calibrate and embed innovation – and the capabilities that underpin it – into their culture. We have seen how this can be done in a product context by market leaders like GE, 3M, Apple and Microsoft. They promote, celebrate and demand product innovation. Businesses that apply the same focus and priority to measuring and evidencing innovation in relation to digital products, digitally-driven services and customers will be the ones that reap the biggest benefits from digital transformation investments.”

Andrew Campbell
Martech Consultant

It’s also worth noting that these programs have been ‘formally adopted’. This could suggest that businesses now have more coordinated digital strategies across the organization, rather than transformation being a siloed marketing or digital team thing. If true, this would be a good sign.

Organizations’ views of their digital maturity always involve a moving target. Those completing their first steps tend to report a confidence which can be misplaced. Digitally mature organizations are focusing not on the finish line (which disappears over the horizon faster than they are running), but instead on the capabilities that enable Digital Agility. A combination of real insight-led prioritization and a level of ‘beginners mind’ humility tends to be a characteristic of those that are successful.

What follows ‘Digital Transformation’ is a continual cycle of evolution. It’s important to know how you’ll measure how well transformation has set the foundations for success, but also to ensure you go from a perception of transformation into this state of continuous improvement and evolution.

Recommendations

1. **At a strategic level, digital success is a continuous process.** This needs to be understood from senior C-suite leadership through middle management, to front-line teams. Everyone is touched by it and can benefit. Make the case for an attitude of incremental improvement and adjustment, and make it clear everyone has a role to play – whether sponsoring and supporting, resourcing and guiding, or executing and measuring.

2. **Be aware of how important measurement of real-world value is.** Too often digital is measured against digital metrics such as traffic or share of sales by channel – this only tells a part of the story. If you expect the support of specific departments, you need to demonstrate value to those departments in ways that impact them and will incentivize engagement and effort. You can read more on measurement and driving digital value by visiting www.netcel.com/services/advisory.

3. **Realize digital evolution is about people.** Understanding your customers, human-centered design approaches, empathizing with your colleagues’ challenges, and bringing people on the journey with you – the right processes and technology are crucial, but people need to see the value, use the systems, adopt the ways of working. Allocate time and resource to understanding what’s needed to get people on the bus, and how to help them feel comfortable and confident.

Section 2

Growing digital maturity

"We have benefited from being able to invest in technology success at scale across a number of operations. At the same time, as with all organizations of our size, with revenues in excess of 25 billion euros last year and with a large and complex customer base, the wiring is very complex in terms of the technology. So we're still very much on that [digital transformation] journey."

James Robinson
Marketing Projects and Operations Director
Randstad UK

Growing digital maturity

In *Section 1* we saw that nine out of 10 respondents to this year's survey have formally adopted a digital transformation program, up from three-quarters in 2022 (*Figure 3*). *Figure 4* looks in more detail at what this means for businesses' view of their digital maturity.

The headline figures are that the proportion of companies saying they have transformed or were always digital-first has tripled (from 6% to 18%). Meanwhile the percentage who describe themselves as 'emerging' has almost halved (from 43% to 24%).

These results reflect the fact that more organizations are in the process of digital transformation than two years ago. This is no surprise, as in 2022 we were still coming out of the Covid crisis. The last two years have seen businesses regrouping and trying to move forwards, rather than just struggling to survive.

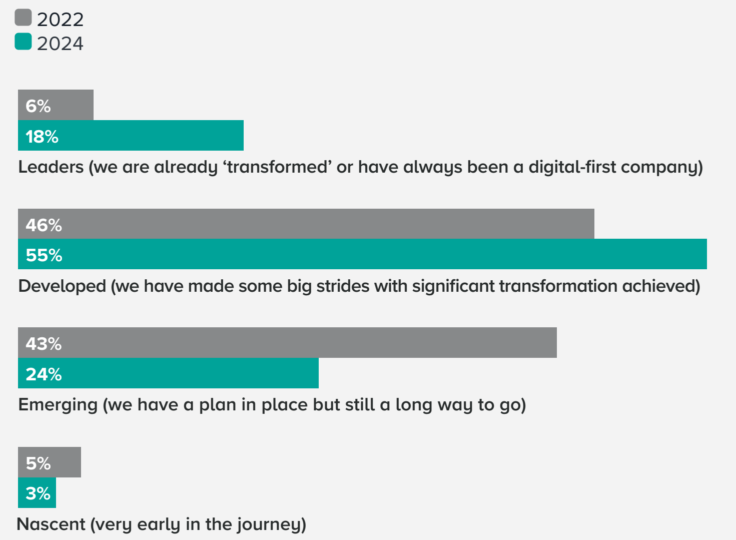
However, in line with our thesis that transformation doesn't end, it's important to understand how many of these digital-first businesses believe their work in this area is done, and how many are committed to (and prepared for) a future of constant digital evolution (*Figure 5*).

The fact that 90% of respondents are saying they are still on the Digital Transformation journey suggests that some are still in the zone of initial confidence that comes from having done it for the first time. This compares to more experienced organizations' realization that it's a lifetime journey.

The winners will be those who are committed to constant improvement based on proper insight gathering. The world is changing so quickly that everyone else, no matter how far ahead they think they are now, will find that things look very different in two years' time.

FIGURE 4

Relative to other companies in your business sector, how would you describe your level of digital maturity as an organization?



The proportion of companies who have already transformed or were always digital-first ('digital leaders') has tripled since 2022.

"A key difference is some issues are universal and affect all sectors whilst we now also see vertical-specific issues, for example where an industry uses digital to develop or reinvent their business model, Hollywood and streaming or retail and ecommerce being obvious examples."

Simon Andrews
Publisher, Fix Newsletter, and Board Advisor

"Organizations would do well to assess how they are doing compared to their peers by using benchmarking services like Digitopia.co and to utilize KPIs as defined by Michael Wade & Massimo Marcolivio et al at IMD Business School."

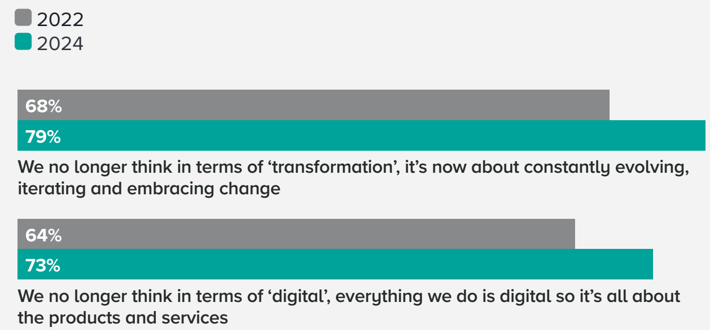
Tim Ellis
CEO
The Digital Transformation People

Growing digital maturity

The good news is that almost four out of five of this year's respondents (79%) say they 'no longer think in terms of transformation'. That's up from two-thirds (68%) in 2022. But the picture is clouded by the three-quarters (73%) who say they 'no longer think in terms of digital because everything they do is all about the products and services.' This suggests at least some think that the strategic work around digital – for example developing new business models or changing organizational structures – is complete.

FIGURE 5

Proportion of respondents agreeing with the following statements



Recommendations

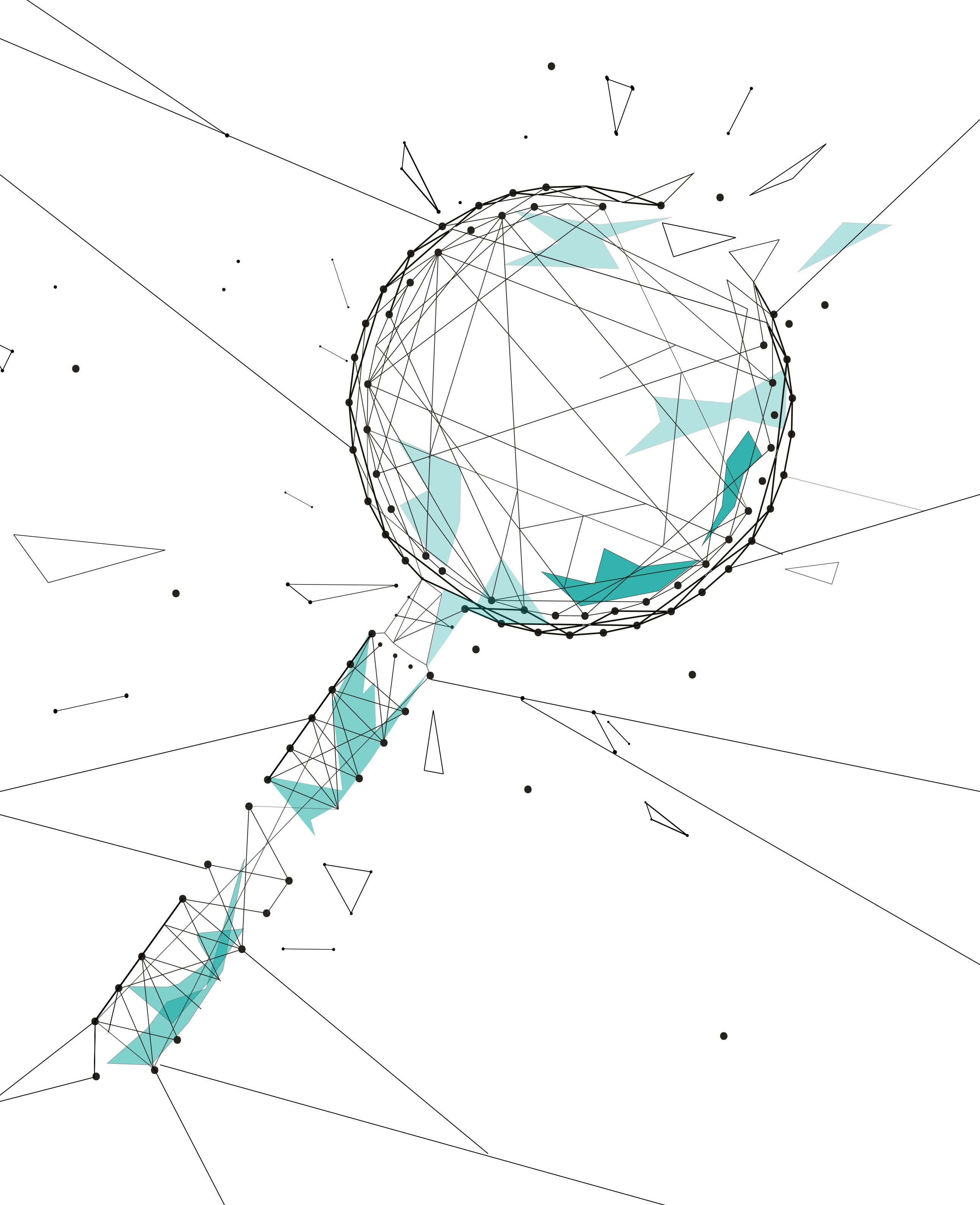
1. **Be honest about your digital maturity and how it can often be patchy across People, Process and Platform.** All three need to move forward together – culture moves with technology, skills move with tooling and process. Build a plan for multi-stakeholder, cross-departmental engagement. Understanding what motivates support by delivering relevant benefits to individuals is the key to bringing everyone with you.

2. **You can't outrun digital progress ... but you can keep up with your customer.** As we have seen in the report, the expectations of customers in using digital experiences are growing faster than the ability of many organizations to meet them confidently. You will always be, to some extent, judged against the best in digital – 'why can't this registration be as easy as brand X? How come I don't get the choice from product Y?'. It will be difficult to be able to deliver at scale of the big competitors. Instead, focus on what differentiates you – and invest in that. Platforms such as Optimizely enable brilliant basics and easy adoption of experimentation and personalization. The key is to translate how your brand best uses these to be more human, and to connect with your market and audience.

3. **Break down your digital roadmap into smaller parts.** Always link the projects and initiatives in your digital program back to your organizational objectives via ongoing measurement. An OKR-based approach to measurement will help link the stuff of today with the strategy over the long term.

Section 3

Defining the digital execution gap



> "The digital execution gap is showing that mindset and ways of working are critical in getting the true value from transformation. Without changing these it's almost impossible to get the true value from technology and systems investment."
>
> **Neil Perkin**
> Digital Consultant and Author of Agile Marketing

Defining the digital execution gap

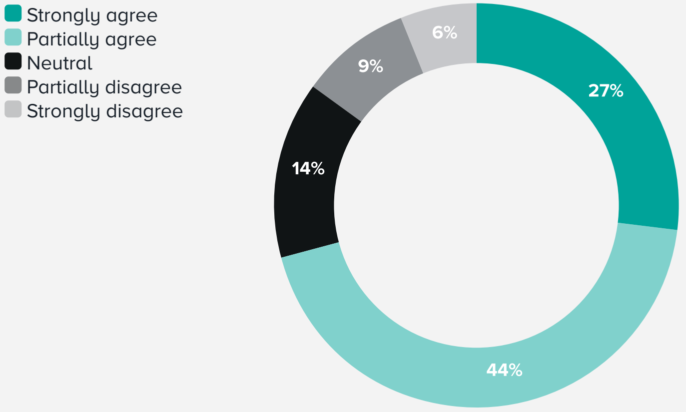
Our 2022 research found that, despite widespread digitization of processes, many organizations were still struggling to operationalize and execute against their strategic digital vision. This year we wanted to look at that struggle in more detail, at the digital execution gap between what customers and other stakeholders expect, and what the organization can actually deliver. The 2024 research confirmed the existence of this gap, with almost three-quarters of respondents (71%) agreeing there is a gulf between the digital experiences customers expect and the ability of companies to meet those expectations (*Figure 6*).

Going into the 2024 research, our hypothesis was that the gap is created – and exacerbated – by uncertainty and deficiencies around strategic plans, the user experience, technology and tools, people and processes, and the availability of data to measure and deliver high-performing digital products. This is largely confirmed by *Figure 7* which shows the major barriers to digital evolution. But what's noticeable is that almost all the problems appear to have grown more widespread since 2022. The sense is that the target is receding faster than businesses can catch up – this is the Digital Execution Gap.

This is no great surprise. It has long been recognized that consumers' expectations of any brand's CX are driven by what might be called the 'Airbnb' effect. That is, they compare any experience not to the best in that sector, but to the best in the world. So, no matter how many tweaks and tucks you make to your digital experience – and you can still make great strides forwards – there's always going to be more you can do. And the more you do, the more you'll identify you can do.

FIGURE 6

The growing gulf
A gulf still exists between the digital experiences that customers expect and the ability of companies to meet those expectations



The questions are therefore more whether you can identify the gap for your business, and measure the impact of what you're doing so you can determine success. In other words, are you blindly doing things or are you actually making business progress?

Approaching this challenge means knowing what matters to your customers, and what you are good at. Don't take on Amazon on price alone if you sell art supplies, for example. Instead, provide the sort of engaging content experience around art that Amazon never could, be the best advisor, and compete on the personal level. Experimentation – particularly around personalization – will be key in discovering what your digital superpower really is.

"Breaking down barriers often comes down to demonstrating the ROI of investment in digital transformation - clear communication of this can align and motivate those with the influence to make things happen. Organizations need a plan that maps to their specific objectives to showcase the value of digital across people, processes, and platforms in meeting these. This is vital for aligning with commercial, customer, and cultural goals. Companies must identify and develop capabilities that provide a competitive edge, investing in people, tools, and products. For digital initiatives, prioritize areas that matter to customers and employees. Understanding and proving digital ROI is essential for securing investment and achieving business success. More on digital ROI can be found in Netcel's Value First eBook."

Dom Graveson
Strategy Director, Netcel

Of course, many of the barriers discussed in *Figure 7* are interlinked. The biggest issue – lack of general funding (cited by 32% of respondents) – will in part be due to the pressure teams are under to deliver, combined with current economic conditions not allowing for sufficient investment. But it is also clearly connected to the lack of C-level support experienced by 26% of respondents. And that in turn will be a reflection of the quality of the business cases being made for investment, fragmented data and unreliable reporting (29%) and the absence of a strategic digital roadmap (27%). Meanwhile, lack of funding will be a major reason for the lack of know-how, skills and capabilities suffered by 31%.

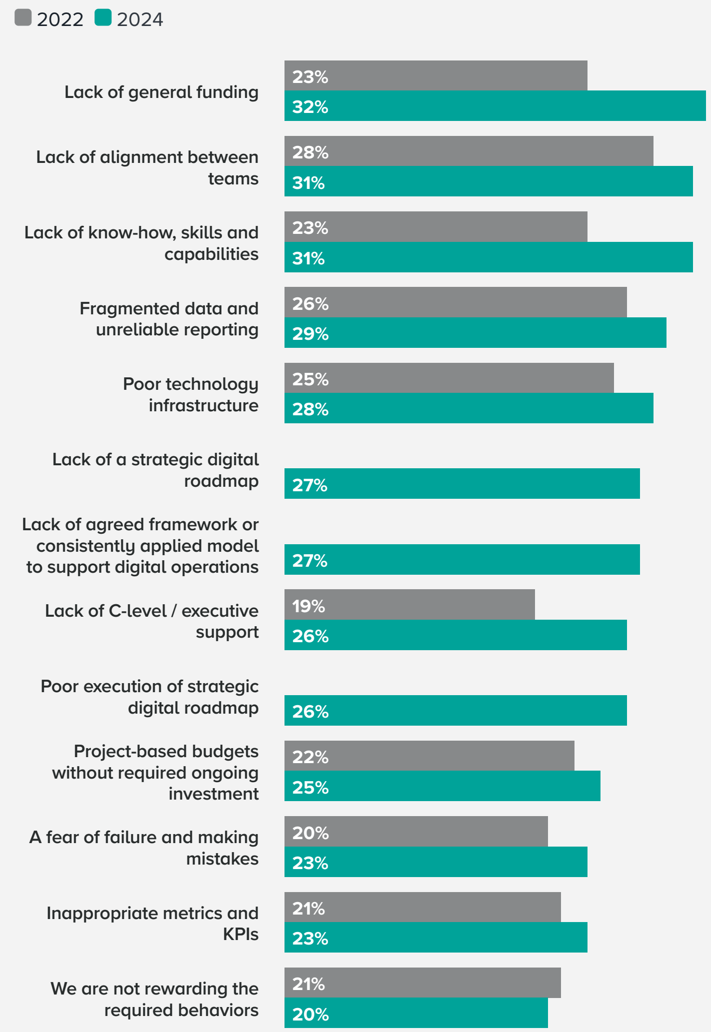
Similarly, inappropriate metrics and KPIs (23%), combined with the lack of C-level intervention to bring departments together, will be behind much of the lack of alignment between teams (31%).

All of this is more reflective of the maturity levels shown in *Figure 4* (18% leaders, 55% developed, 24% emerging) than it is of the claims of three-quarters of respondents that they no longer think in terms of 'transformation' or 'digital' (*Figure 5*).

Overall this data, while somewhat contradictory, could suggest a gap between tactical success with digital (better sales through a website, or a successful channel shift to an app) and the strategic foundations needed to bring People, Process and Platform together for sustained digital success. Another issue is with measurement – many organizations talk about measuring digital metrics, but these can become siloed and tactical – owned by one or two departments and focusing on headline numbers.

FIGURE 7

Proportion of respondents regarding the following as major barriers to their evolution as a digital business



“Aside from lack of general funding and lack of C-level support, the barrier that has risen the most since 2022 is ‘lack of know-how, skills and capabilities’. This is likely linked to the new frontier of AI opening up so quickly and gaining such prominence as a ‘game changer’. The exploding demand for analytics capabilities in a new area of expertise is bound to be seen as a concern.

“The other notable takeout from *Figure 7* is that there is no ‘silver bullet’ to achieving digital evolution. It requires a coordinated, integrated and holistic approach which can only be achieved by a top-down, enterprise-wide, strategic approach led from the C-suite.”

Andrew Campbell
Martech Consultant

Defining the digital execution gap

The lack of strategic measurement around the longer-term impact of digital initiatives on areas such as customer satisfaction, employee effectiveness and share price, can mean that digital doesn’t get the leadership role it deserves. Many organizations still keep their digital teams within the IT or marketing departments – when perhaps a more senior cross-departmental role would be more appropriate and effective in enabling real profound change.

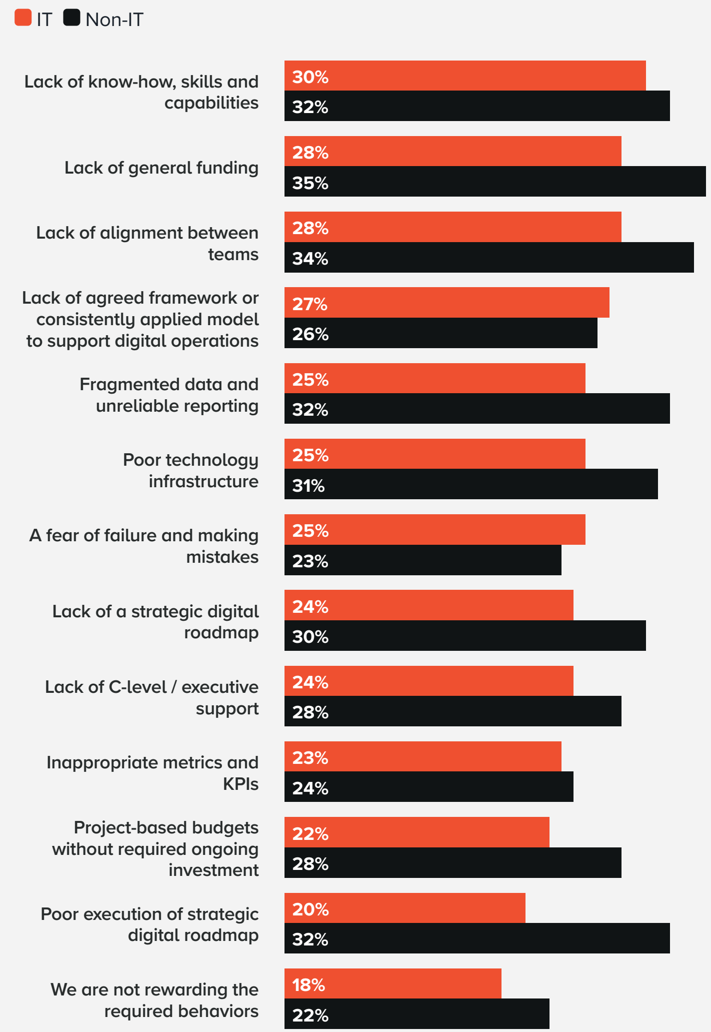
A rosier view from the IT department
Considering the lack of alignment between teams, and the perceived quality of companies’ technical infrastructure, it’s worth looking at the difference in attitudes between IT staff and their peers in the rest of the organization (*Figure 8*).

What’s immediately striking is that IT staff (defined here as CIO/CTO) are less likely to see the barriers than are their counterparts in marketing. Most noticeably, they’re 12 percentage points less likely to see poor execution of the strategic digital roadmap as a problem. They’re also seven percentage points less likely to be concerned about lack of funding and fragmented data, and six points less likely to worry about team alignment, poor technology, lack of a strategic digital roadmap, or project-based budgeting.

The irony is that, although IT heads appear less worried than CMOs about team alignment, it’s one of the most likely causes of the wider disparity. The two groups are often working within their own silos, creating a communication challenge and hindering effective running of a strategic initiative/program across the business. It’s rarely a technology challenge.

FIGURE 8

Proportion of respondents regarding the following as major barriers to their evolution as a digital business (IT vs. non-IT)



"Adopting new technology is a challenge. But it is a more structured and formalized undertaking than working out what to do with the new technology toys! Marketers are still grappling with the latter and working out how to translate new technology into transformative improvements to customer experiences. Technology adoption is complex but nowhere near as complex as understanding and responding to consumer needs in a constantly changing world.

The other factor underpinning IT confidence is the widespread adoption of agile development methodologies and project management techniques which have transformed their ability to manage the demands of large-scale, wide-ranging technology projects. These have been a game-changer."

Andrew Campbell
Martech Consultant

In addition, there may be an element of job protection. IT will feel they have things in hand, with a path to maturity and adoption that the wider business is yet to understand. What's more, as has been widely observed, while occasionally the tech infrastructure is genuinely poor, it's more usually a lack of planning, adoption or good quality implementation of the technology that's the problem. And when there is a poor implementation, it usually results from a lack of understanding of what's really needed.

Overall these responses are encouraging and indicate a realization of shared responsibility. However, how often are digital initiatives 'technology only' initiatives? Everywhere in the results we see that people aren't using the platforms they have, or feel the technology they have isn't suited to the way they work. This is perhaps due to them not knowing how to drive these systems effectively. It's also likely there isn't enough working across departments; IT are incentivized on getting the thing done or launched, increasing uptime, etc. while other departments are incentivized on their own targets (e.g. marketing-qualified leads). It all comes down to more sharing being needed across the two perspectives.

Recommendations

1. **You don't have to aim to be the best across all areas.** Start by understanding maturity across areas such as capability, measurement, personalization and experimentation, and technology, and set realistic targets that you then can adjust as you learn. Many organizations invest too much too early without delivering the potential value that they already have at their fingertips. Focus on sweating the assets you have.

2. **Invest in evolutionary digital capability.** There is a sense over the past few years that some organizations are waiting to see how things pan out, for things to settle, before making a decisive move on investing in digital teams beyond a project-by-project approach. This makes a lot of sense from the perspective of delivering value fast.

3. **AI will likely be a profound disruptor, as well as offer a huge opportunity in your future.** No one can predict the impact of AI across customer experience, products and services, and organizational culture. All you can be sure of is that it's already here to stay. One of the fallacies of the 'AI revolution' is that it will end at some point, and some will be prepared and others not. This technology, like digital technology, will come in continuous waves, impacting different sectors in different ways, sometimes limited by the technology, sometimes limited by people's adoption of them.

Section 4

Who's driving digital initiatives?

> "Senior leaders must better understand digital's long-term transformational potential. Often viewed as short-term projects, digital initiatives should be seen as evolutionary, with success measured by long-term goals. Investment decisions should balance commercial goals with cultural, customer satisfaction, sustainability, and future readiness. Digital leadership at the executive level is crucial for maximizing technology benefits. Organizations that outperform typically have digital leaders in the c-suite, highlighting the importance of digital representation in strategic decision-making."

Dom Graveson
Strategy Director, Netcel

Who's driving digital initiatives?

The previous section made clear the need for C-level involvement in digital initiatives. They need to be committed to setting the strategy, as the lack of a strategic roadmap was seen as major challenge by more than a quarter of respondents (*Figure 7*). They need to support that strategy with appropriate funding, KPIs and organizational structures. And they need to bring the relevant department heads together to encourage better communications and alignment.

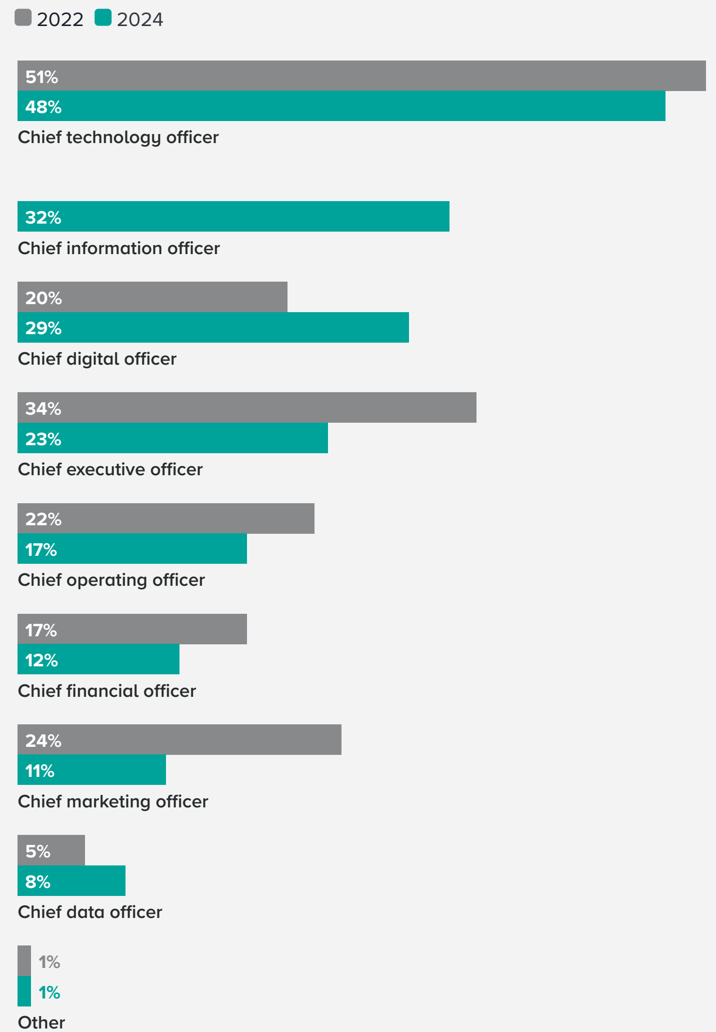
It's therefore striking that the CTO (48%) is still seen as the executive with most influence on digital initiatives (*Figure 9*). Next are the CIO (32%) and the Chief Digital Officer (29%). The CEO is seen as 'most influential' by 23%, while the CMO is a distant seventh (11%).

All this suggests that many businesses are not as 'post-transformation' as they might like to think; that they're still treating digital initiatives as primarily a technology issue.

Strategy and planning should start with the desired business outcomes, set by the CEO. The CTO or CIO should then be part of the multi-disciplinary team responsible for developing the strategy for delivering these outcomes. However, there still needs to be someone taking a holistic view. The rise of the Chief Digital Officer (up from 20% to 29%) suggests they may increasingly be that person, certainly when seen in the context of the waning involvement of the CEO (down from 34% in 2022).

FIGURE 9

Which two C-suite executives (or equivalent) are most influential in driving digital initiatives within your organization?



Who's driving digital initiatives?

Taking a balanced view

Despite the heavy weighting towards a technology-led approach apparent above, 2024 survey respondents are increasingly confident their organization has the balanced view required by a digital-first business (*Figure 10*).

Almost nine out of 10 respondents (88%) said they have the right balance of capabilities (up from 73% in 2022). Similar percentages said they have the right organizational structure and culture, and the right balance of art and science.

FIGURE 10

Proportion of respondents agreeing ('strongly' or 'somewhat') with the following statements

Once again this suggests another 'digital gap'; a disjoint between what people think about the state of their organization, and what's actually required to be a digital business.

Recommendations

1. **Support your digital ecosystem through the right organizational structure.** When doing digital, it's critical to ensure that the strategy is in place to understand what you're trying to do and why, so that you can understand whether you're yet using the technology to its capability. Make sure the right skills and capabilities are available to get value from the technology so you can realize the potential. Evaluate, year on year, to understand what problems might rear up in the future that need to be addressed. Ensure that the right organizational structure is in place to support the individual systems making up your digital technology ecosystem. It should be a joined-up ecosystem delivering on business outcomes.

2. **Ensure organizational collaboration.** We often find the technology function within organizations disconnected from marketing, with both functions operating in silos. This is evidenced by the differentials in the report between the senior technology and marketing representatives. The adoption of digital technology, and the likelihood of achieving organizational success, is much more likely to be achieved through a steering process involving stakeholders from the different disciplines. Technology teams often feel there is a clear path to maturity and adoption, however the wider business is not yet on the same journey.

3. **Be prepared to challenge the next feature.** We can get caught up in developing the next new feature or improving a particular digital journey. These are all important. However, too often this is undertaken as part of a tactical plan. Be prepared to challenge the HiPPO, or any stakeholder, as to whether you're really moving towards your strategic vision set at the outset of any significant digital initiative, or you're just building new features.

Section 5

Measurement, optimization and experimentation

“Innovation must become an organizational imperative. Marketers must find a means of quantifying and measuring it in order to maintain a constant focus on delivering it.”

Andrew Campbell
Martech Consultant

Measurement, optimization and experimentation

Earlier in this report (*Figure 7*) we saw that three of the most widespread barriers to evolution as a digital business are fragmented data and unreliable reporting (affecting 29% of respondents), lack of a strategic digital roadmap (27%), and poor execution of that roadmap (26%). The previous section also reiterated that the C-suite sits at a nexus point, controlling funding, structure and culture in response to the business cases made by department heads.

But even without this information, it would be hard to believe a company could become digitally mature without a clear, specific model for linking digital initiatives to business objectives, and the metrics to determine success and failure.

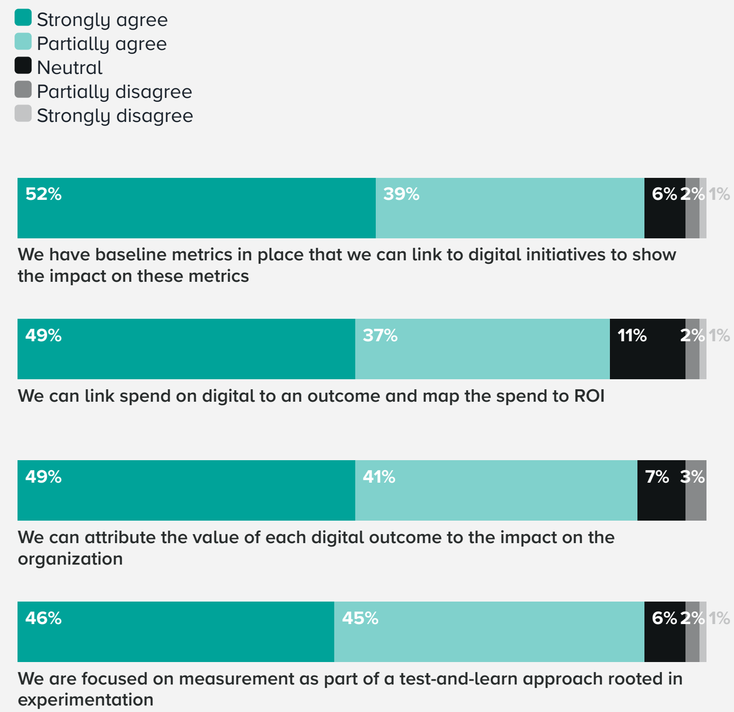
This year’s research suggests the majority of respondents think they have both the model and the metrics in place (*Figure 11*). Over half (52%) strongly agree they have baseline metrics in place that show the impact of their digital initiatives. Another 39% partially agree.

Slightly fewer say they can map digital spend to ROI, or attribute impact on the organization to the value of each digital outcome (49% strongly agree in each case). Slightly fewer still (46%) strongly agree they are focused on measurement as part of a test-and-learn approach, hinting that the agile, evolutionary model of the digital-first business is perhaps not as widespread as claimed.

Indeed, these results suggest there’s a massive amount of measurement and experimentation going on that we neither see nor hear about in the marketplace. It may be respondents’ insistence that they have this in place actually reflects a lack of maturity in this area – a sense of ‘beginner’s confidence’ – and a lack of understanding of what ‘good’ actually looks like or of what the data being collected actually means.

FIGURE 11

Thinking about measurement of your digital investment, to what extent do you agree or disagree with the following statements?



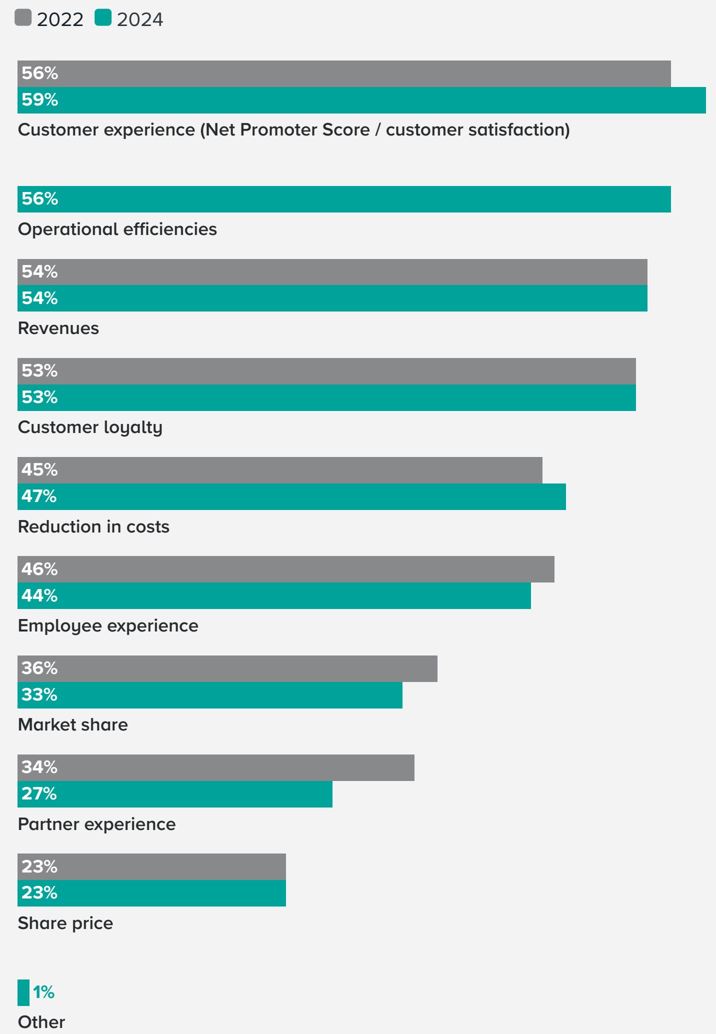
Just over half of companies strongly agree they have the baseline metrics in place to show the impact of digital initiatives.

Customers come first – at least in metrics
Looking at the metrics businesses use, the most important are customer experience, revenues, customer loyalty, and cost reduction, as was the case in 2022. Operational efficiencies, added to this year's survey, are the second most important (*Figure 12*).

The lack of any significant change in the results between 2022 and 2024 is surprising, in particular those with a strong connection to business outcomes such as revenue, cost reduction and share price. It suggests that organizations are still not focusing enough on digital as a driver of business success. A business doesn't need a good customer experience; it needs a good customer experience to deliver on a business outcome. The focus is subtly but fundamentally different.

FIGURE 12

What are the most important metrics for measuring the success of your digital initiatives and programs?



Recommendations

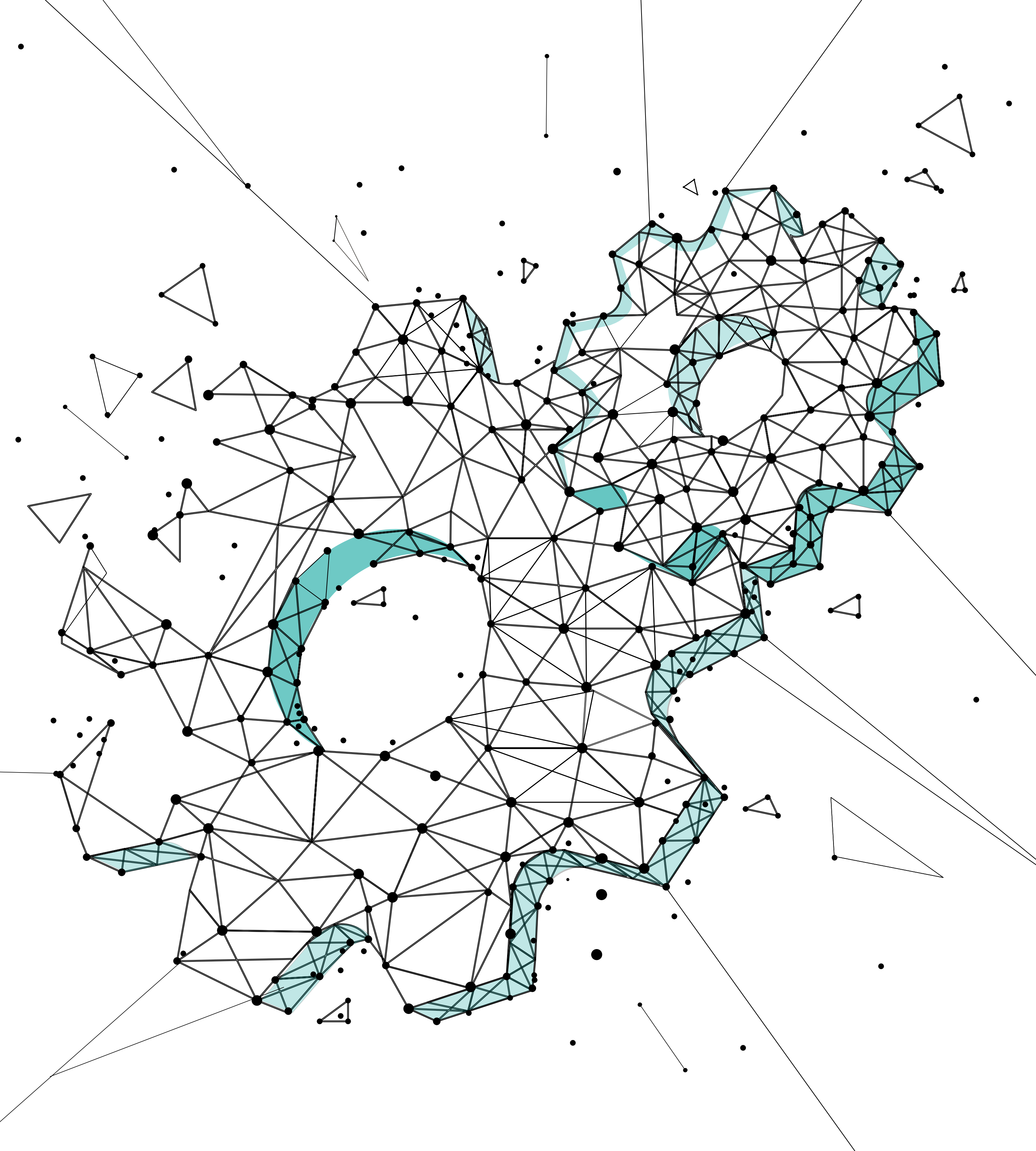
1. **Personalization is experimentation.** Too many organizations develop personalization strategies in isolation from an experimentation culture. Personalization is simply another form of experimentation. We only personalize to drive a specific outcome, which itself should be measured to identify success or, indeed, failure. This is simply another form of experimentation and therefore expect both success and failure from personalization. The only real failure is failing to acknowledge this.

2. **Be realistic with the measures of success.** Digital and, in particular, the experiences delivered to end customers, will always present opportunities for further innovation and improvement. This is not a measure of success or failure. Understanding the gap between the current state and future state, knowing how you will measure and be able to prove demonstrable value of the changes, is key to the true understanding of digital success and impact.

3. **You won't get it right first time, but you can demonstrate value from the start.** Focus on balancing what you invest in across a balanced portfolio of known achievable quick wins that fix immediate problems, with the longer-term infrastructure and governance that might require more effort and take longer to deliver strategic value. Focus on a balance of accelerating time-to-value with some calculated risks that uncover your possible future states.

Section 6

Technology as an enabler



> "The vision is for a harmonization of technology, but that journey will take time because there's so much legacy to take into account. There's the reality of building anew whilst maintaining that existing technology as well to ensure that it's still working for our clients and candidates. To make that migration is a significant undertaking, and you need to develop internal skills relating to agility and project management to bring complex IT problems over the line."

James Robinson
Marketing Projects and Operations Director
Randstad UK

Technology as an enabler

Technology is obviously critical for effective execution of digital strategies. Poor technology infrastructure is seen as a major barrier to evolution as a digital business by just under a third of our respondents (28%). This goes hand-in-hand with fragmented data and unreliable reporting, which is a major barrier for a similar proportion (*Figure 7*).

However, our 2024 research shows that respondents are generally positive about their technology setup (*Figure 13*). In particular, four out of five either strongly or partially agree their marketing technology ecosystem helps them deliver against their digital vision.

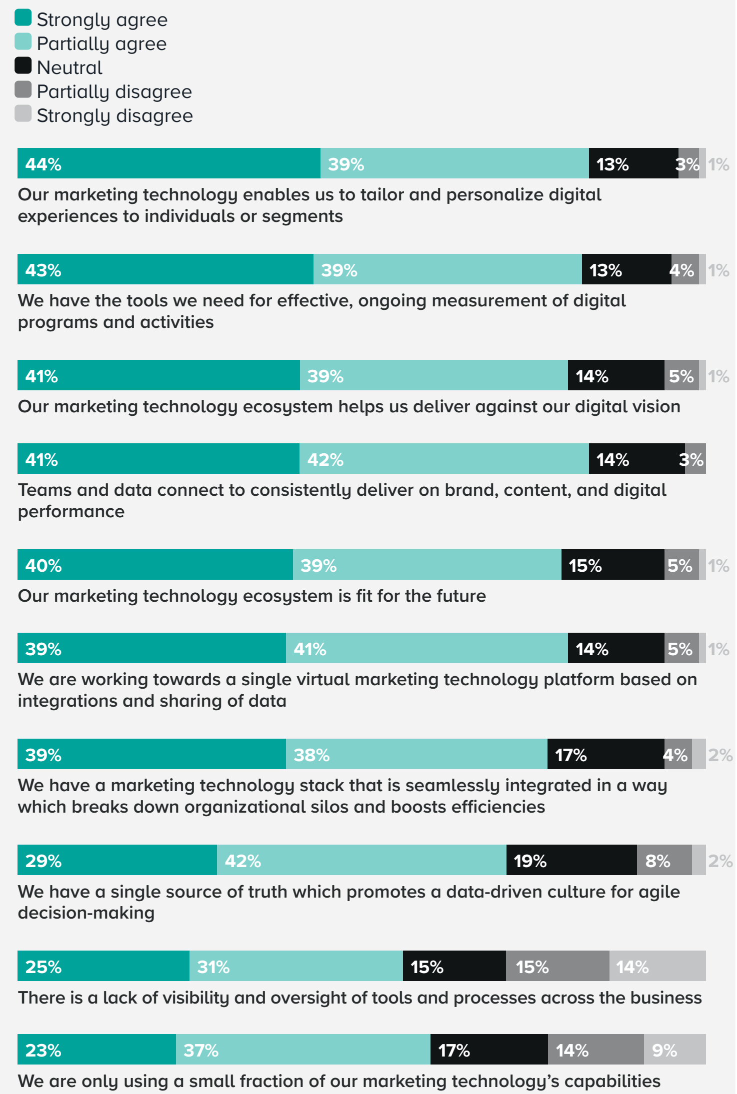
A similar proportion also agree that their martech ecosystem is fit for the future. It's worth noting, though, that a majority (60%) agree they are only using a small fraction of their marketing technology capabilities, although that figure has dropped from 72% in 2022. Over half of respondents also agree there is a lack of visibility and oversight of tools and processes across the business (56%).

It also bears repeating that the best technology in the world is worthless if people can't – or won't – use it. Lack of know-how, skills and capabilities is seen as just as big a barrier to digital evolution (*Figure 7*). In fact, it may be that most organizations' tech is fit-for-purpose. They just don't have the skills, culture, or overall strategy to make the most of it.

This could reflect a number of possible problems. It might be that, once the solution is delivered, IT isn't incentivized to train people, or only provides a one-off briefing and expects everyone to get on with it.

FIGURE 13

To what extent do you agree or disagree with the following statements relating to your marketing technology setup?



It might be that the organization doesn't have a clear, iterative and ongoing adoptions policy, unveiling a bit of the solution at a time and building skills gradually.

It might be that the departments supposed to be using the solution weren't consulted on requirements or given a stake in its success once it went live.

It might simply be that showing someone how to use a system is one thing, but them using it in their daily role is something quite another. In this case, building centers of excellence within actual user teams can deliver very different results.

Or it might be that the business procures perfectly good technology in isolation, without the wider strategy to make it all play nicely together, and to help solve specific challenges that people within the business have.

If the latter is the case, *Figure 13* contains good news. It shows that 39% of 2024 respondents strongly agree they're working towards a single virtual marketing technology platform. A further 41% partially agree. This suggests that teams are increasingly working together. It may also hint at a move by IT departments to provide a single, easily governable solution, which may also be cheaper, and easier to maintain.

Composable? Headless?
Digging into technology choices more deeply, *Figure 14* and *Figure 15* show the uptake of composable and headless architectures. A significant majority have adopted each approach (69% and 54%, respectively).

In the case of composable architecture, this confirms the trend away from single vendor solutions and towards bringing together the best solutions for specific purposes. Meanwhile, the rise of headless suggests a) that the market is increasingly adopting SaaS technologies, and b) that there is considerable marketing buzz which is generating interest. What remains unclear is the extent to which businesses understand what headless is, and what benefits it can deliver, and how much is 'shiny new thing' syndrome. Are companies looking for a tech solution to what is actually a management problem, that of getting the most out of their technology investment?

FIGURE 14

Is your organization using composable architecture?

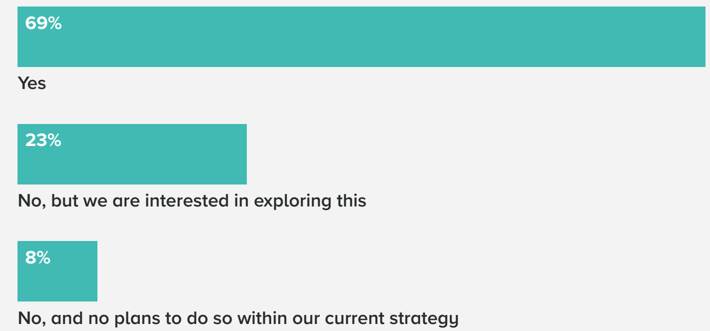
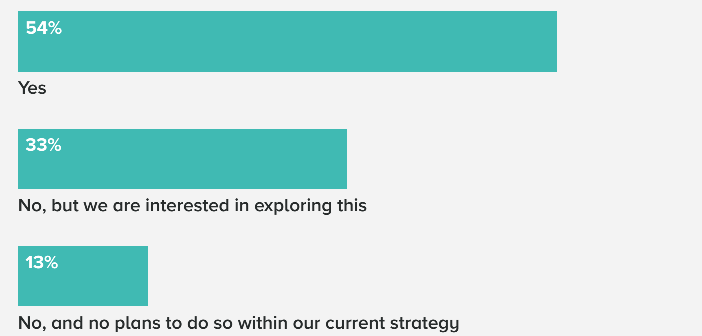


FIGURE 15

Is your organization currently deploying technology using headless architecture?



"The good news is that the shift to composable architectures is being enabled by a new wave of technology components and middleware supporting integration across the technology stack. These foundational technology components support the unbundling of application components (activation, decisioning, analytics, reporting, presentation) to support a modular, unbundled technology stack."

Andrew Campbell
Martech Consultant

Recommendations

1. **If the technology doesn't feel fit for purpose, evaluate yourselves.** Often technology, or the implementation of the technology, is blamed for a poor experience or operational difficulties. If you find this to be the case, don't be afraid to look at the organization first. Was there a clear vision in place, were organizational objectives discussed, were different stakeholders consulted? This is quite often the cause of technology dissatisfaction. Today's technology is robust, reliable and, in most cases, adaptable to meet the right objectives.

2. **Understand the value of digital to your organization and build solid foundations.** Many organizations don't truly understand why they do digital and can't articulate the value to senior stakeholders or the C-suite. Mapping digital evolutionary changes to organizational objectives is fundamental to support the business case to 'do digital properly'. By focusing on the right objectives, digital can support the financial foundations of any organization through customer loyalty as well as acquisition. However, if you can't understand why you're building a new feature, and how it will support the organization's goals, stop and re-evaluate.

3. **Build fit-for-purpose governance.** Digital evolution and bridging the digital execution gap requires new, flexible approaches to decision making, resource allocation and value measurement. Flexibility actually manages and reduces risk, as a brittle, plan-first-then-execute approach is dangerous in a fast- moving world. Involve your senior leadership in addressing this challenge – how will we change how we govern IT that supports fast-moving marketing, product, customer engagement, CX when we are increasingly using automation, AI, data, new suppliers and supply chains?

Section 7

Use of data and operationalizing AI

“Organizations have long struggled with siloed data, but the rise of AI highlights the need for effective data management. AI's potential is unlocked with robust data, enabling advancements in personalization, experimentation, content experiences, and customer service. Proprietary, well-managed data enhances the power and authenticity of AI-driven messages and experiences. Companies with a clear data strategy and AI vision will gain a competitive edge, leveraging data to drive significant operational changes and business advantages.”

Justin Masters
CTO, Netcel

As with technology, the right data strategy is crucial to underpin a constantly evolving, digital-first organization. But while most companies agree they have some kind of data strategy in place, significantly fewer are able to segment customer data and drive actions across multiple channels, or access and use data effectively to support their decision-making (*Figure 16*).

This struggle suggests that many companies don't have a data strategy. Rather, they may have only reached the preceding step; a program to make data visible and accessible. A strategy involves getting people to leverage that and use it to make evidence-based decisions.

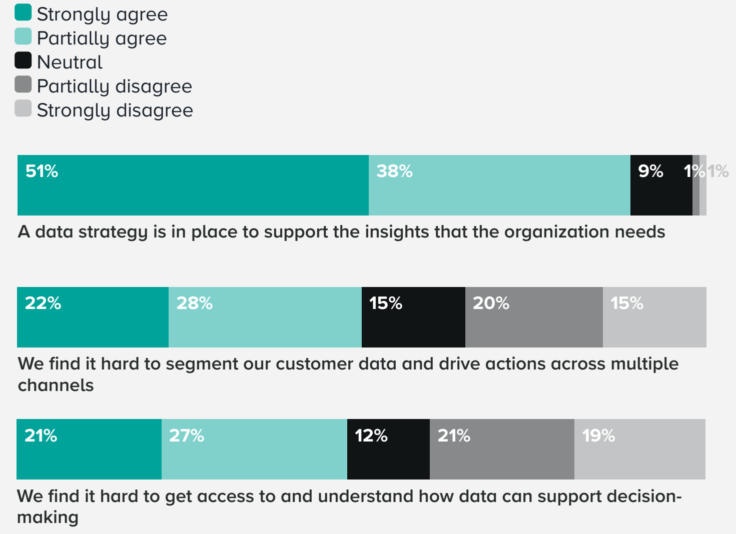
A maturity curve for AI adoption

The right data infrastructure is also vital to support progress with AI, most companies' current source of fascination/terror. The responses to *Figure 17* sketch a maturity curve of AI adoption. What's striking is how many respondents claim to already be capitalizing on AI. Some 42% strongly agree that they are not only using the technology, but are also seeing the promised efficiencies. A further 37% partially agree.

Slightly less advanced than that, over a third (37%) strongly agree they were early adopters of AI and are now using it across their organization. And, another step behind, a third (34%) strongly agree they no longer view AI as 'hype' and have embedded it firmly in the business.

FIGURE 16

To what extent do you agree or disagree with the following statements relating to how you derive and activate insights from data?



Many companies struggle to segment customer data and drive actions across multiple channels, and to access and harness data effectively to support decision-making.

Use of data and operationalizing AI

However, many companies are still very much only feeling their way in this area. Over a quarter of respondents (27%) strongly agree that they're in the early days of using AI, and are finding it hard to measure the impact and value. A quarter strongly agree they're finding it challenging to use AI in their organization, and a fifth don't know how to leverage generative AI in their content marketing.

It's also worth harking back once more to the question of strategy. How many among the companies that feel they're advanced in their use of AI are using it as part of an overall strategy, with a clear understanding of how it can help the business? How many are experimenting? And in how many cases is there a strategic framework for that experimentation, as opposed to just getting it out of the box at a departmental level (or below) to see what it can do?

A lot of businesses are seeking to 'de-risk' their use of AI by adopting a 'Bring Your Own AI' strategy, with their own custom models as the foundation for any content creation or marketing programs.

Recommendations

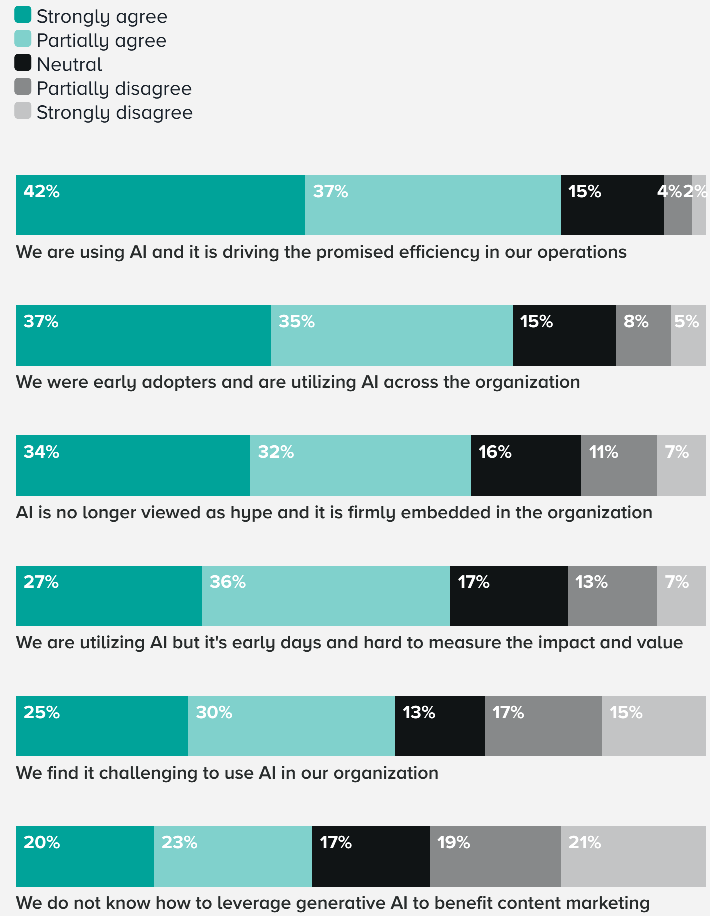
1. **Build a data foundation for success, don't build data silos.** Ensure that a data strategy is in place to support the required intelligence and insights. Often organizations have a data strategy to store or protect data, however this is significantly different from a mature data strategy which enables automated insights and dashboards. Not every organization should need to employ a team of data scientists. Some will of course, but many should have a data strategy in place that covers data repositories and tooling to generate the insights that the organization needs to understand, learn and adapt from.

2. **Be realistic with your AI adoption.** Don't fall into the trap of painting an undeliverable AI dream. AI may have been around for a number of years, however its application in many areas is still in its infancy and there is a lot of market-driven hype around the adoption of AI. In reality, much of what AI has to offer is a few years away from wholesale benefit realization. Having a strategy for the adoption of AI, and a consistent evaluation of its potential disruption to your sector, is fundamental for future business evolution, perhaps even survival.

3. **Get started, even if it doesn't feel the ideal time.** The only way to be able to understand the threat and opportunity of AI is to engage with it. Get experimenting, start using it, unleash the curiosity of your people to try out and discover new things. There are big wins to be had across editorial process, content workflow, personalization and analytics. The sooner you build a capability and establish confidence with it, the sooner you will see how it can enable a better future for your organization, customers and teams. The greatest virtuoso pianist was practicing scales once.

FIGURE 17

To what extent do you agree or disagree with the following statements relating to your experience with AI and related technology?



Conclusion

The data that forms the basis of this report confirms that there is a digital execution gap. It also suggests that this gap is growing. The barriers to digital development that respondents reported in our 2022 survey have become more widespread, to the extent that almost three-quarters of this year's respondents agree there is a gulf between the digital experiences customers expect and the ability of companies to meet those expectations.

The reasons for the gulf have also become clearer. External pressures – including geopolitical turbulence, economic uncertainty and falling consumer confidence – are driving many businesses to focus on their fundamentals. They're concentrating on customer retention rather than acquisition, on cutting costs, and on sweating their assets rather than experimenting. At the same time, customers are more demanding – and more cost-conscious – than ever. And the sudden explosion of activity in AI and machine learning has created a new source of both fascination and fear for organizations.

The key ideas that emerge from this report are as follows:

Businesses need to aim for digital agility. Our 2022 report concentrated on the need for them to stop thinking in terms of digital transformation – a one-and-done response to the changing nature of business – and to think instead about their readiness for digital evolution. This means creating an organization that can respond quickly and effectively to changes in market conditions, customer behavior and technological development. This organization will have a culture of experimentation, management and governance that encourages flexibility, and an overriding focus on the customer.

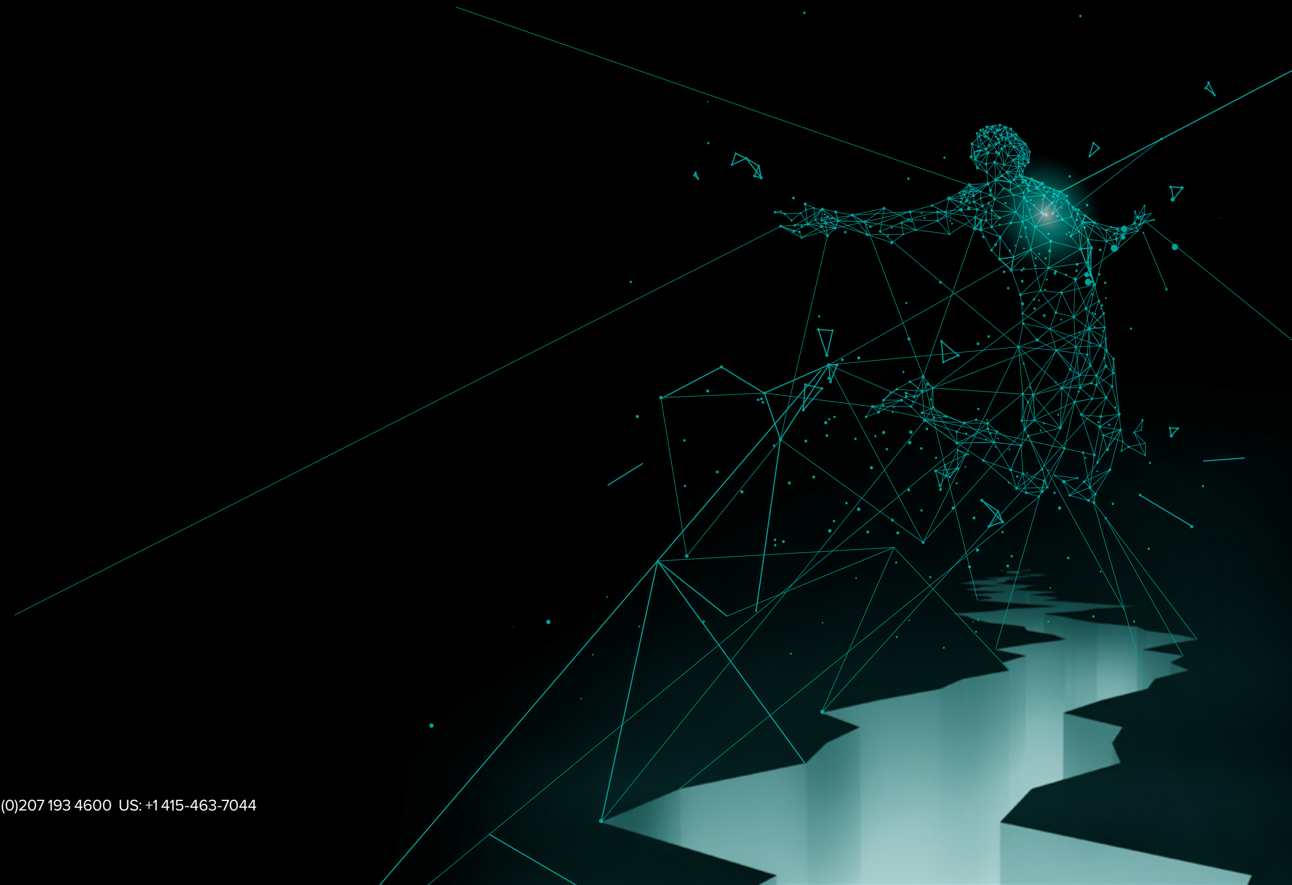
Technological change is about much more than just technology. Whether it's the adoption of AI or looking at new ways to approach your tech stack, getting people to use new technology is almost always more important than the choice of technology. The CTO is still seen as the executive most likely to have influence over digital initiatives within their organization. But the biggest barriers to evolution as a digital business (after lack of funding) are lack of alignment between teams, and lack of know-how, skills and capabilities. This is clear evidence that greater collaboration is needed between those choosing which technology to buy, and those who will be using it.

Metrics must reflect business objectives. Our 2024 data suggests that organizations are still focusing too much on digital as tactical response, rather than as a driver of business success. This not only hinders cooperation between teams, it also undermines efforts to build a holistic understanding of the business, and makes it harder for the C-suite to make the right decisions. The only way to resolve this is to establish business-wide KPIs and then use them to establish departmental and team objectives.

There is no single right way to do things. Sustained business success depends on having the right balance of people (teams, skills, capabilities, personalities and culture), process (tooling, methodologies, ways of working, governance and resources) and platform (CMS, data, CRM, integration and appropriate architecture). This blend will be different for everyone. The only way to achieve it will be through iteration based on measurement of performance against the business's key objectives.

"The report highlights the need to find the right balance between people, process and technology implementation in order to keep pace with digital change. Audience and customer expectations can often create the feeling of 'catching up', being out of touch or focusing too much in one area for FOMO reasons. But putting emphasis on digital agility and experimentation to support the progress of an overall digital vision is a really clear steer and a great takeaway message."

Lawrence Chiles
Head of Digital Services, The National Gallery



The CEOs' view

Tim Parfitt, CEO, Netcel

Bridging the Digital Execution Gap unites companies globally as a common objective that all are driven to achieve. It's the route to both short and long-term success. While a small number of well-known companies have proven themselves as being consistently successful in bridging the digital execution gap, the vast majority fall short of this lofty but valuable ambition.

Why is this? And what can companies do to make progress towards bridging the digital execution gap?

This research and report go a long way to unearthing the primary reasons why many companies are challenged, and what they can do differently going forwards.

The starting point remains the same as it was 2,500 years ago when Chinese military strategist, Sun Tzu, wrote in The Art of War:

Strategy without tactics is the slowest route to victory.
Tactics without strategy is the noise before defeat.

How can digital leaders become highly competent in defining a vision and strategy that set up their company to succeed; and then be equally highly competent in executing on that strategy, with operations and tactics that bring that strategy to fruition?

And not just achieve this once, but repeat this success year after year.

The answers lie within the findings of this report - the need for companies to move beyond being digitized businesses to become true digital businesses. And with that, to develop a culture with deeply ingrained characteristics of adaptability, agility and the willingness to disrupt their own business.

As with achieving both strategic and tactical competence, becoming a true digital business is easier said than done. And the reason for that challenge is due to the age-old economic principles of resource scarcity.

Most companies have a scarcity of time, knowledge and finance. Many decisions need to be made in faster time than is desirable, based on less insights and knowledge than is desirable, and with less budget than is desirable.

To successfully bridge the digital execution gap, companies must make optimal investment decisions across the three Ps explored in this report - People, Process, and Platform - despite the challenge of working with limited resources. Digital leaders need clarity, focus, drive and determination to balance strategy and tactics effectively while using resources wisely.

Consistent, smart decision making in these areas, guided by the insights provided by this report, will help transform digitized businesses into true digital enterprises, while unlocking significant rewards by bridging the digital execution gap.

The CEOs' view

Alex Atzberger, CEO, Optimizely

"We are living in one of the most exciting periods for technical innovation. Technology allows enterprises to create and optimize their digital experiences and unleash employee creativity by automating low-value tasks through AI. Yet the necessity for transforming and changing how we work has only become more urgent and requires top-down level initiative."

Next Steps

Join the Netcel Digital Change Forum

An invitation-only peer network for digital change makers. It provides a forum and sounding board for digital transformation leaders to share insights, opportunities and challenges. The group meets quarterly for facilitated face-to-face discussion around topical issues and trends.

Join

Get in touch

Netcel's Advisory team can help you drive outstanding ROI from your investment in digital products and experiences – from vision and strategy, through technology selection, to data and AI activation and measurement of impact.

Get in touch with our advisory team here.

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