

 **Innovar**  **Grupo·epm**  
 Desafíos que transforman vidas **2021**   
**23 al 27 de agosto**

**Un espacio**  
**que fortalece la cultura**  
**de la innovación**

# Tendencias tecnologicas digitales para el 2021 y más allá y su impacto en nuevos negocios


Juan Gutiérrez  
Sr Executive Partner

Innovation is the execution of new ideas that create value.

*This definition emphasizes:*

- *Novelty (“new ideas”)*
- *A useful outcome that generates business value or, for governments and not-for-profits, mission value*
- *The importance of implementing (“execution”), not just exploring, the new ideas*

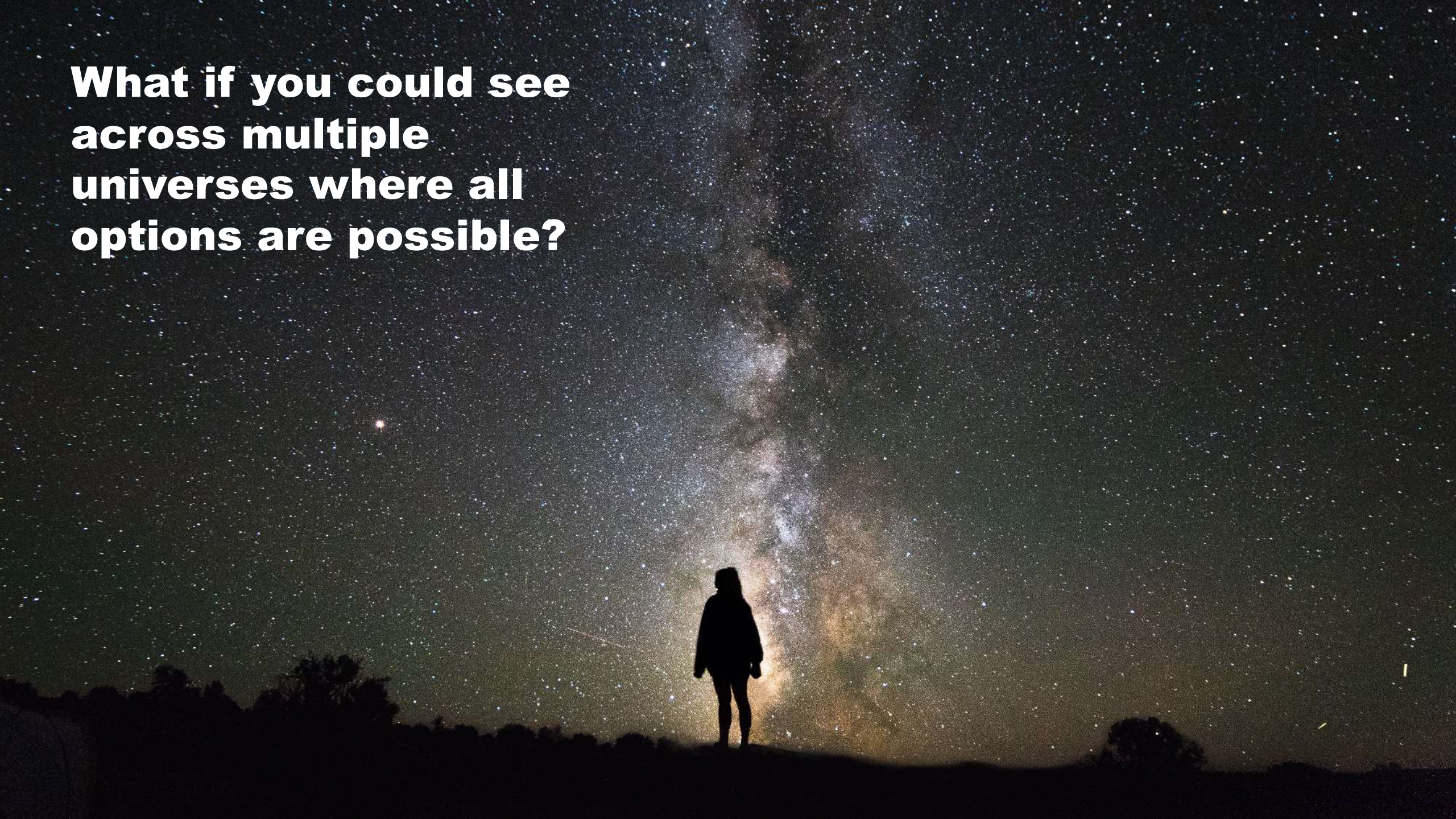


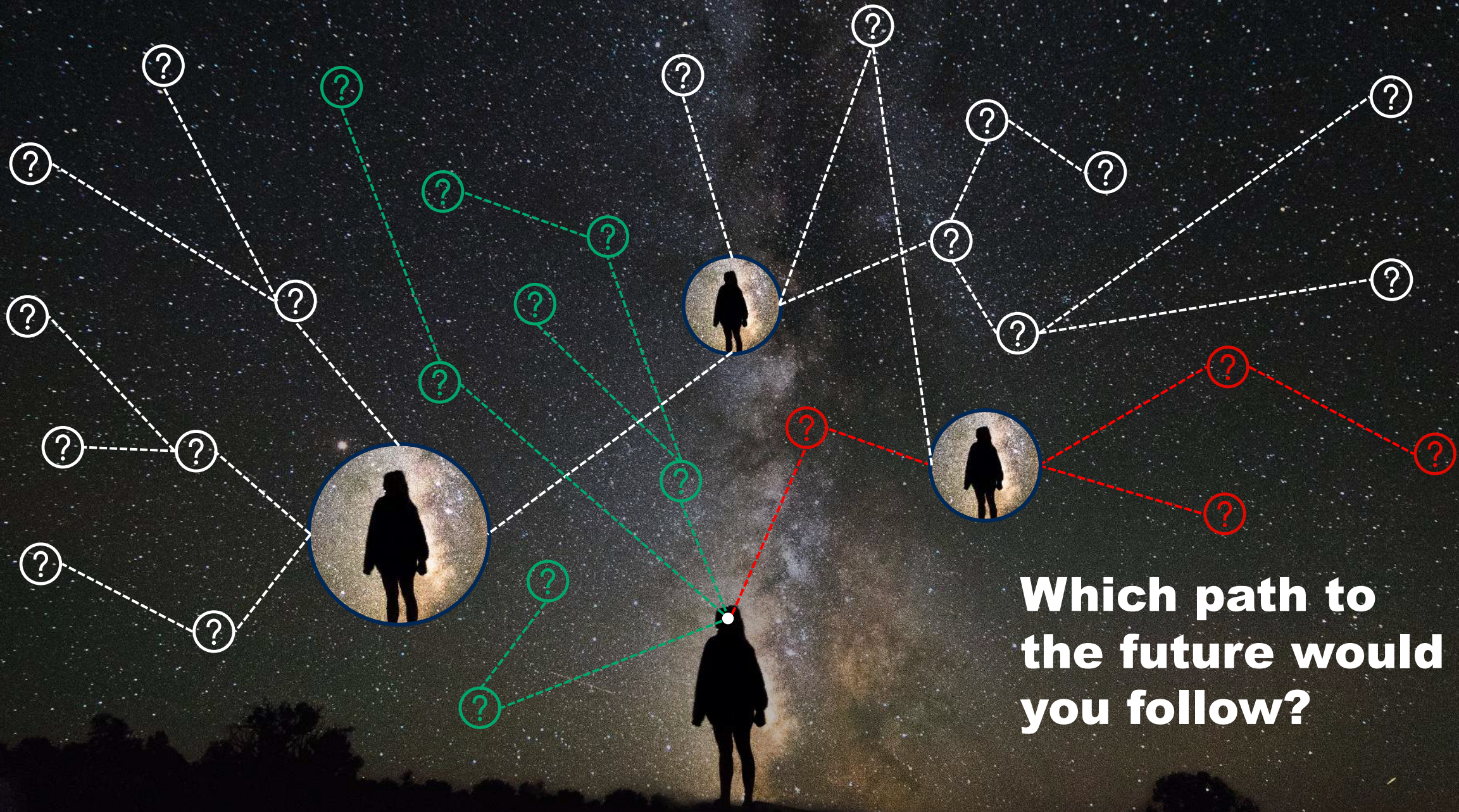


**Future-proofing** is the process of anticipating the future and developing methods of minimizing the effects of shocks and stresses of future events.

**Protect Against Disruption**

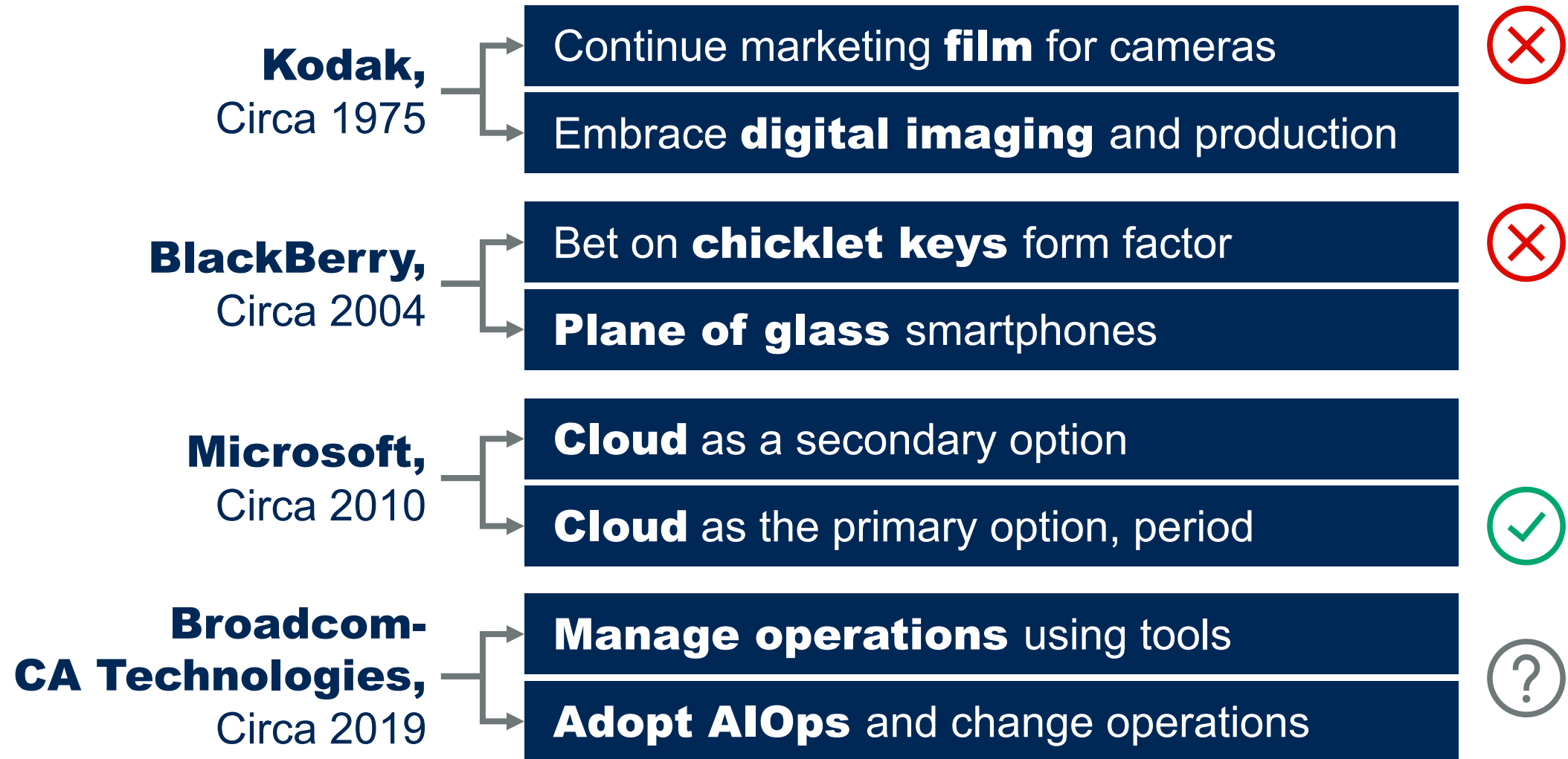
**What if you could see  
across multiple  
universes where all  
options are possible?**





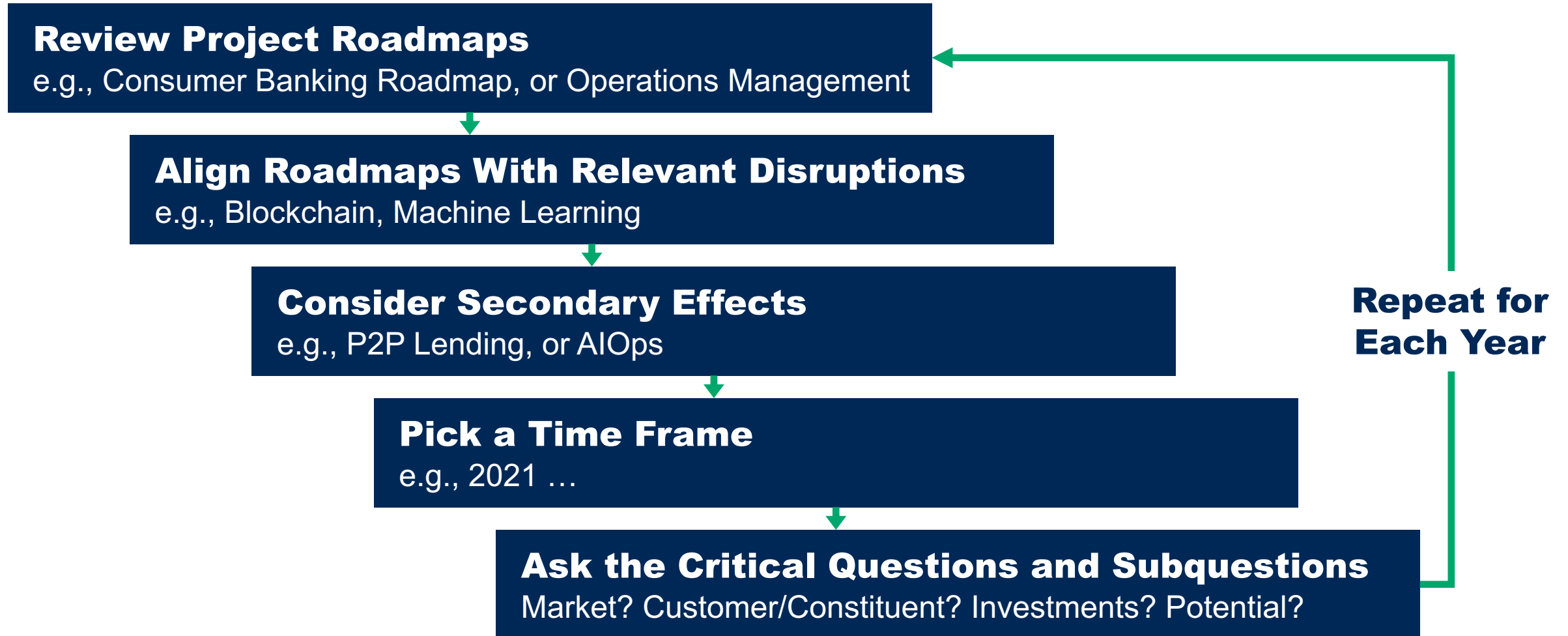
**Which path to the future would you follow?**

# That, Was the Question Faced By ...



# How Do You Do This?

## Find the Green Path





# But Reset Does Not Mean Just Restart



**Pivot to New  
Things**

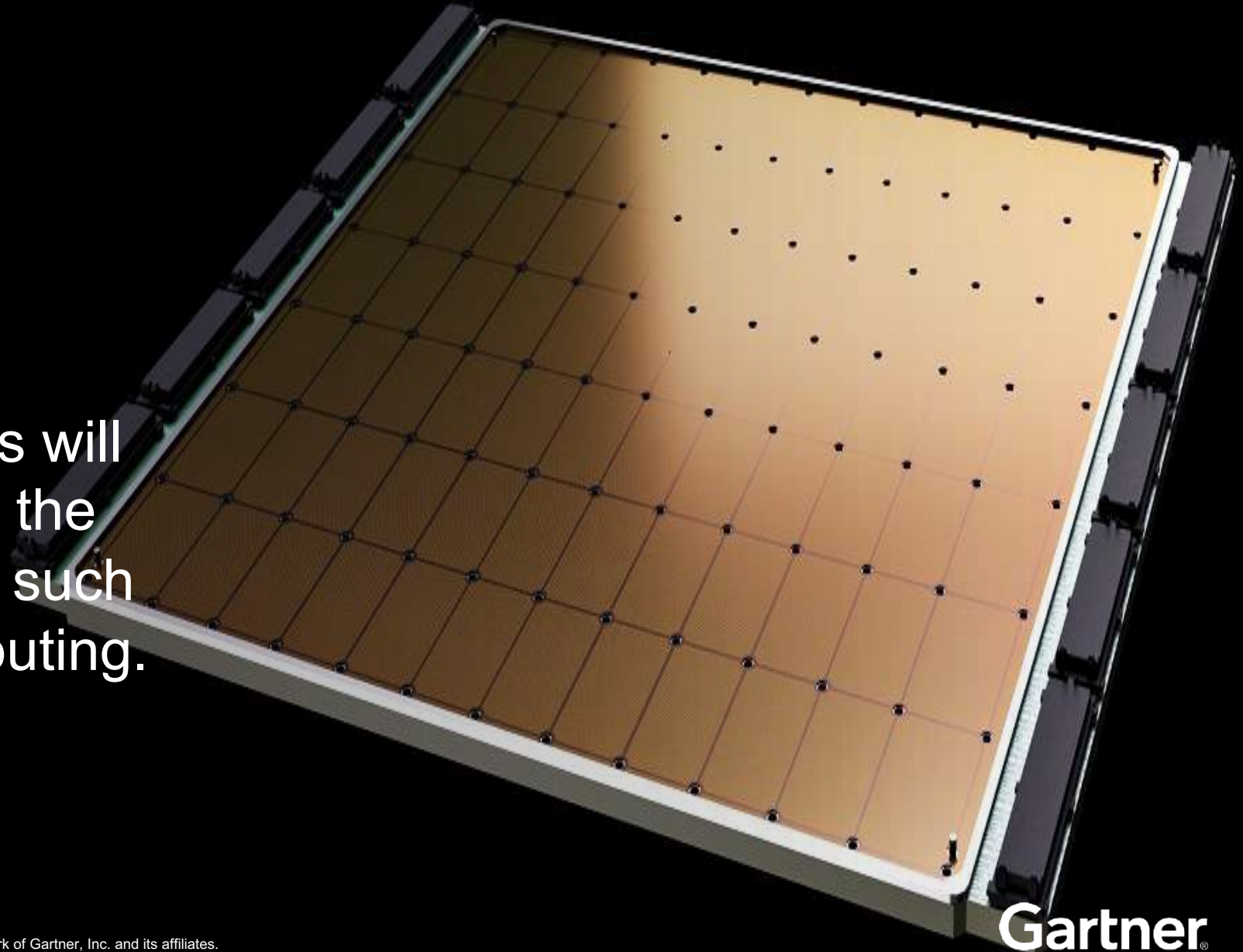


**Forge New  
Trails**

# 1

By 2025, traditional computing technologies will hit a digital wall forcing the shift to new paradigms such as neuromorphic computing.

**Analysis:** Nick Jones



# Top 10 Strategic Predictions for 2021 and Beyond

|  |  |  |  |  |
|--|--|--|--|--|
| <b>Technology</b><br><b>The Wall</b><br>nontraditional computing rises<br>2025 | <b>Storage</b><br><b>30%</b><br>start DNA storage trials<br>2024               | <b>Experience</b><br><b>40%</b><br>add virtual experiences<br>2025     | <b>Products</b><br><b>20%</b><br>products first touched by customers<br>2025 | <b>Leadership</b><br><b>25%</b><br>Chief Operating Officers “by proxy”<br>2024 |
| <b>Applications</b><br><b>75%</b><br>conversations recorded at work<br>2025    | <b>Workplace</b><br><b>20%</b><br>office space becomes childcare space<br>2023 | <b>Society</b><br><b>30%</b><br>listen to the voice of society<br>2024 | <b>Customer</b><br><b>75%</b><br>freelance customer support agents<br>2025   | <b>Content</b><br><b>30%</b><br>prioritize content moderation services<br>2024 |

# 3 Things to Consider



**Innovation  
and Efficiency**



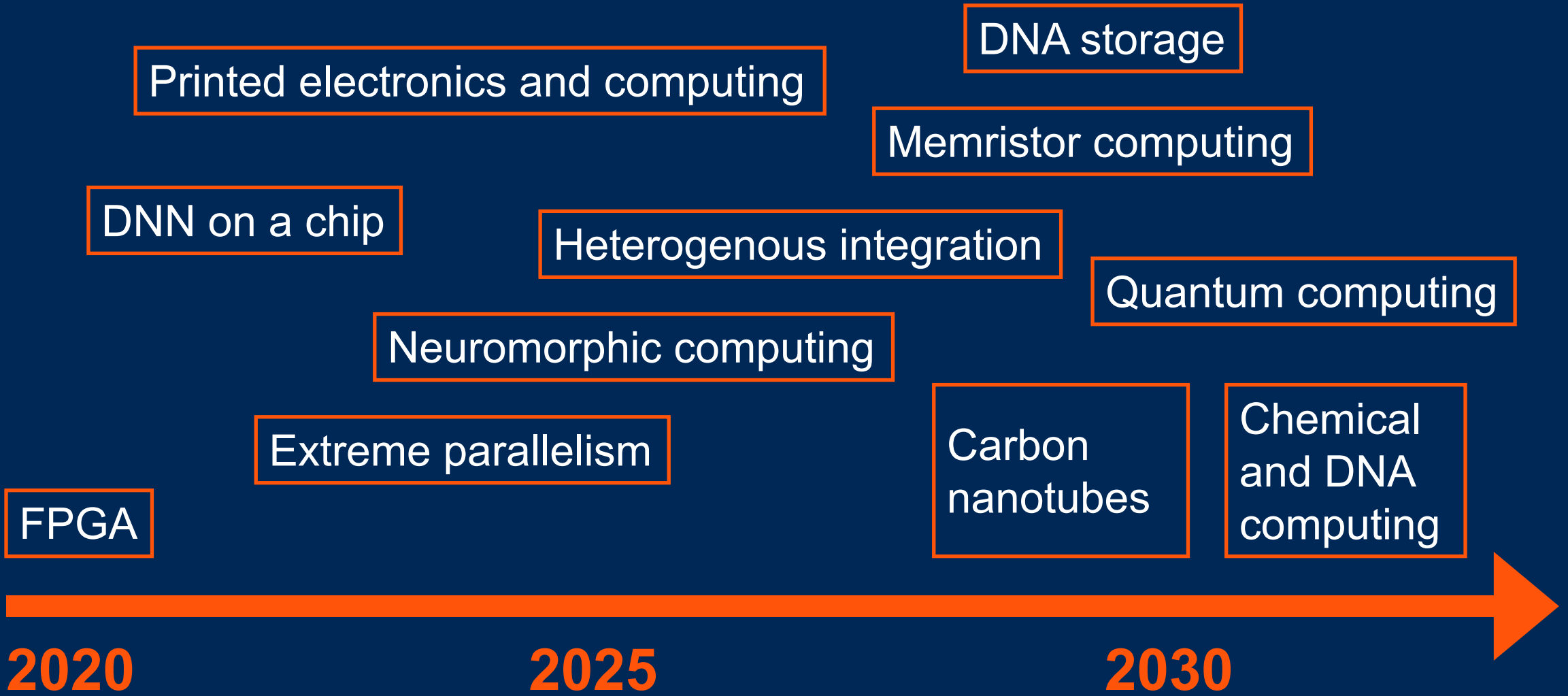
**Greater  
Effectiveness**



**Impact on  
Society**

A cobblestone path receding into the distance under a spotlight. The path is made of dark, irregularly shaped stones, and the spotlight creates a bright, glowing area on the path that narrows as it goes further away. The background is dark, making the path and the text stand out.

**Nontraditional  
approaches will  
enable the next  
round of innovation  
and efficiency ...**



Dates when technology will be available to early adopters

# The Approach

- Conventional computing is hitting a wall
- Performance, power consumption and cost aren't supporting digital innovation needs

# Organization Imperative

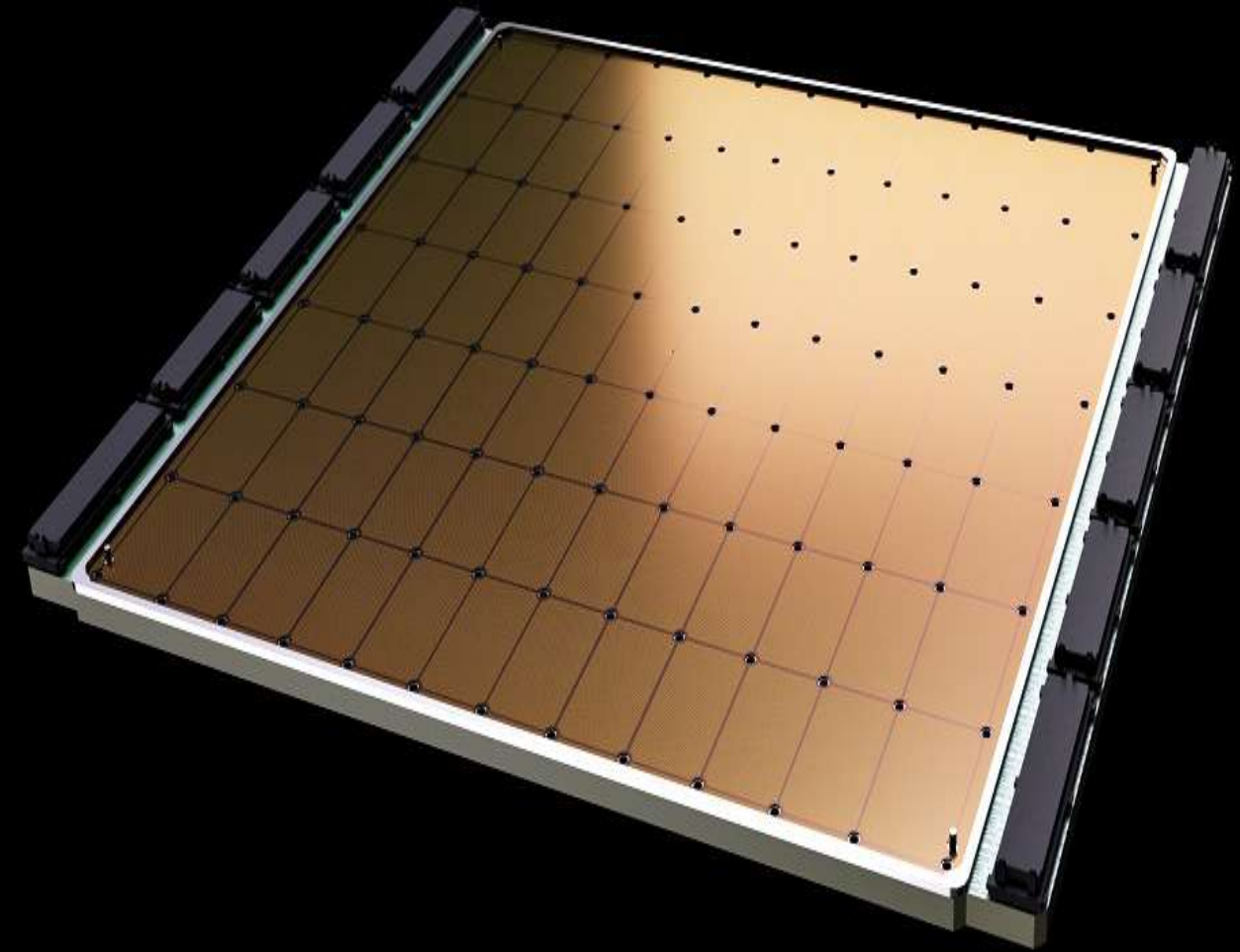
- Start now, expect a decade of radical innovation
- Pilot new computing technologies and architectures
- Watch for the long-term game changers



# Near-Term Flag

Through 2021, Quantum bit advances, DNA storage cost reductions and circuit density increases will make notable headlines in mainstream media.

**Analysis:** Nick Jones



# 2

By 2024, 30% of digital businesses will mandate DNA storage trials, addressing the exponential growth of data poised to overwhelm existing storage technology.

**Analysis:** Daryl Plummer

# The Approach

- DNA storage life is thousands of years
- Storage density must outpace storage need
- Costly and slow today

# Organization Imperative

- Cloud-based DNA trials
- Align uses — archival or active storage?
- Monitor data explosion

# Near-Term Flag

Through 2021, watch for minor advances toward random access to DNA archival data in the exabyte-to-yottabyte-scale.

**Analysis:** Daryl Plummer

A person wearing a VR headset is shown from the chest up, reaching out with both hands towards a glowing, digital interface. The interface consists of numerous small, colorful nodes (red, blue, green) connected by thin lines, creating a complex network or data visualization. The background is dark and slightly blurred, suggesting an indoor setting with ambient lighting.

# 3

By 2025, 40% of physical experience-based businesses will improve financial results and outperform competitors by extending into paid virtual experiences.

**Analysis:** Dave Aron

# The Approach

- Immersive experiences are more affordable
- Pandemic changed attitudes about remote and virtual
- Imperative to reinvent physical offerings

# Organization Imperative

- Look for virtual experience product opportunities
- Build competencies in VR/AR, digital twins and IoT
- Experiment and deliver quickly

# Near-Term Flag

In 2022, at least three leading providers of physical experiences will make more than 10% of their revenue from virtual, immersive experiences.

**Analysis:** Dave Aron



A white robotic arm is shown in a vineyard, reaching towards a bunch of dark grapes. The arm is positioned in the lower right quadrant of the frame, extending upwards and to the left. The background is filled with green grape leaves and several clusters of dark grapes hanging from the vines. The lighting is bright, suggesting a sunny day. The overall scene depicts the integration of robotics in agriculture.

# 4

By 2025, customers will be the first humans to touch more than 20% of the products and produce in the world.

**Analysis:** Rajesh Kandaswamy



# The Approach

- New technologies are automating most processes
- Pandemic is a hyperaccelerator
- New source of competitive advantage and disruption

# Organization Imperative

- Hyperautomation is a principle, not a project
- Update processes while you automate
- Use scenario-planning to decide where to apply full automation

# Near-Term Flag

Through 2021, watch for an increase in planning for fully automated factories and farms.

**Analysis:** Rajesh Kandaswamy



A person is silhouetted against a bright sunrise, standing on a rocky mountain peak. The sun is low on the horizon, creating a lens flare effect. The background shows a vast mountain range under a clear sky.

**Organizations  
will reset  
responsibilities,  
risk and rewards  
to find **greater**  
**effectiveness ...****

# 5

By 2024, 25% of traditional large enterprise CIOs will be held accountable for digital business operational results, effectively becoming “COO by proxy.”

**Analysis:** Janelle Hill,  
Joanne Kopcho

# Greater Effectiveness

- “Digital” to generate above-the-line value
- Technology and business are inseparable
- Unforeseen business capability gaps are the No. 1 cause of execution planning and delivery

# Organization Imperative

- Help business leaders to own differentiating business capabilities as digital products
- Selectively refactor business capabilities into composable building blocks
- Realign promising digital pilots to the updated digital strategy

# Near-Term Flag

Through 2021, the trend of CIOs in highly digitalized traditional businesses reporting to the CEO will become a flood.

**Analysis:** Janelle Hill, Joanne Kopcho



A vintage reel-to-reel tape recorder is the central focus, resting on a wooden desk. Two reels of magnetic tape are visible: one is a bright orange color, and the other is black. The recorder's control panel features several knobs, sliders, and a small meter. A black telephone handset is connected to the machine. In the background, a brown leather case is open, and a person's hand is visible near the recorder. The overall scene suggests a historical or archival context of data recording.

# 6

By 2025, 75% of conversations at work will be recorded and analyzed, enabling the discovery of added organizational value or risk.

**Analysis:** Magnus Revang and Anthony Mullen

# Greater Effectiveness

- We have no privacy, get over it. Everything records
- Measuring intangibles (e.g., satisfaction) is now possible
- New organizational value comes from monitoring

# Organization Imperative

- Create an ethics board with employee representatives
- Ensure understanding of legal risks
- Focus on analytics and not individual monitoring



# Near-Term Flag

In 2022, a major corporate acquisition will use analysis of recorded conversations as the primary data source for deciding which employees to retain.

**Analysis:** Magnus Revang  
and Anthony Mullen



# 7

By 2025, customers will pay a freelance customer service expert to address 75% of their customer service needs.

**Analysis:** Emily Potosky,  
Jacob Joseph-David, Jennifer Irwin

# Greater Effectiveness

- Customers resolve service issues outside of company channels
  - Better experts will cost money
  - CX, brand and opportunity to monetize service can be at risk
- 

# Organization Imperative

- Identify popular freelance experts
- Understand legal and regulatory risks
- Listen to VOC and customer feedback

# Near-Term Flag

Through 2021, there will be a 15% rise in customers seeking outside help after being frustrated by traditional support channels.

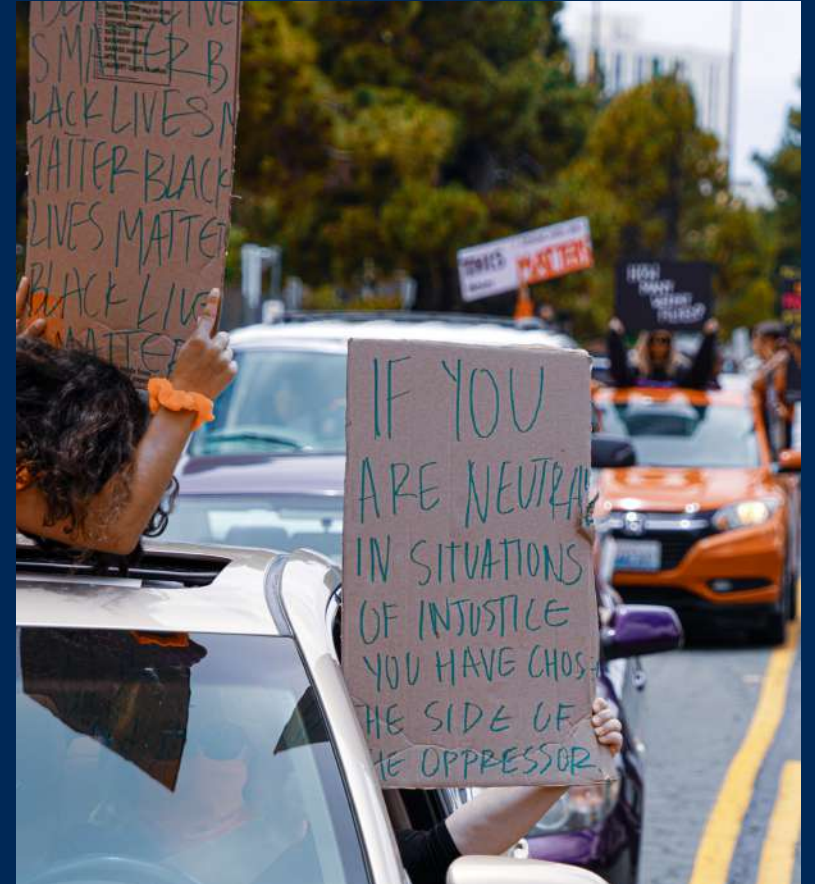
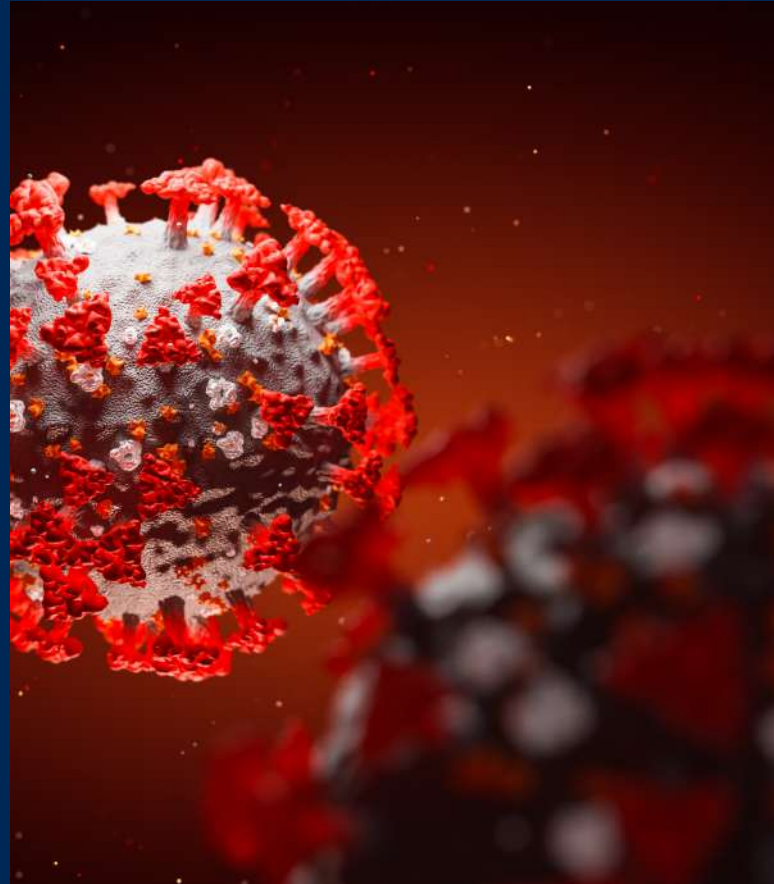
**Analysis:** Emily Potosky,  
Jacob Joseph-David, Jennifer Irwin



An aerial photograph of a large crowd of people gathered on a paved area, likely for a protest or public demonstration. Many individuals are wearing white hats and light-colored clothing. A prominent banner is held across the crowd, featuring the text 'AMLO ERES EL MALO' and other smaller text. The background shows green trees and a clear sky.

**External groups, communities  
and employees will put  
pressure on corporate brands  
to measure their  
impact on society ...**

# What Do Fires, Viruses and Inequality Have to Do With One Another?



# 8

By 2024, 30% of major organizations will use a new voice of society metrics to act on societal issues and assess the impacts to their business performance.

**Analysis:** Daryl Plummer, Gene Alvarez

## Impact on Society

- Being tone deaf to societal issues can hurt quickly
- Opinion metrics are now as reliable as click-through analysis

## Organization Imperative

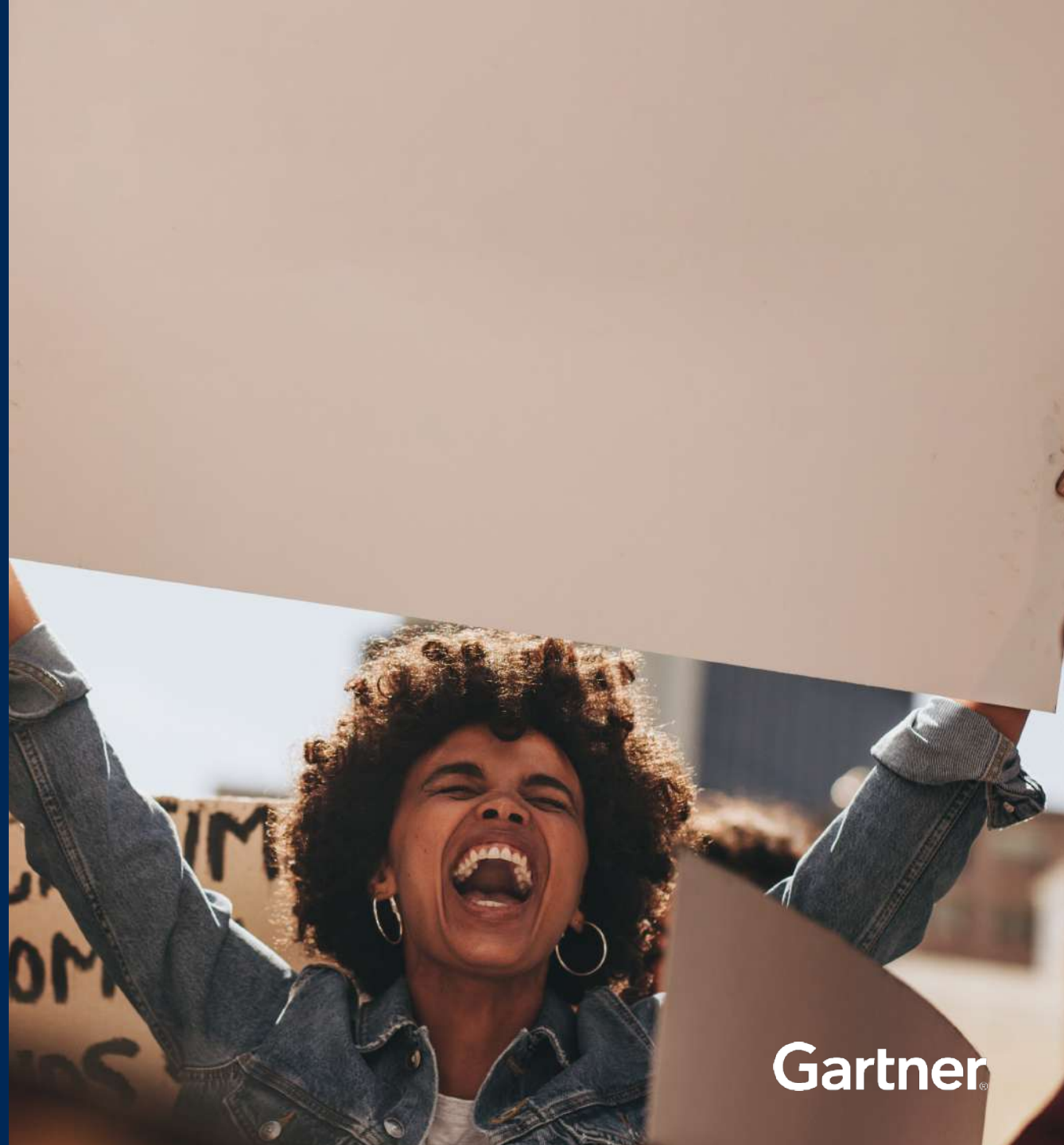
- Make this a C-suite imperative
- Use business composition to react quickly
- Sense the opinions of society on a regular basis
- Adopt tools to measure impact on society (e.g., sentiment analysis)



# Near-Term Flag

Responding to the voice of society, more product brands or messages will be changed or dropped through 2021 than in the previous five years.

**Analysis:** Daryl Plummer, Gene Alvarez



Gartner®

# 9

By 2023, large organizations will increase employee retention by more than 20% through repurposing office space as on-site childcare and education facilities.

**Analysis:** Emilie Siegler Morton, Kaelyn Lowmaster, Emily Rose McRae

## Impact on Society

- Societal and worker demand for childcare still unmet
- Organizations helping reduce high cost and time spent on childcare
- Repurpose empty office space during and postpandemic

## Organization Imperative

- Evaluate real estate holdings and potential facility spaces
- Set and state goals upfront (e.g., attracting top talent in challenging recruitment markets)
- Audit existing care benefits

# Near-Term Flag

By early 2021, 20% of private childcare centers will have closed their doors permanently, leaving a dearth of qualified providers to meet demand.

**Analysis:** Emilie Siegler Morton, Kaelyn Lowmaster, Emily Rose McRae



# 10

By 2024, content moderation services for user-generated content will be surveyed as a top CEO priority by 30% of large organizations.

**Analysis:** Kyle Rees and Michael McGuire



## Impact on Society

- Any company with online presence faces malicious content
- Brand advertisers must neutralize polarizing content
- Industry standards for content moderation will emerge

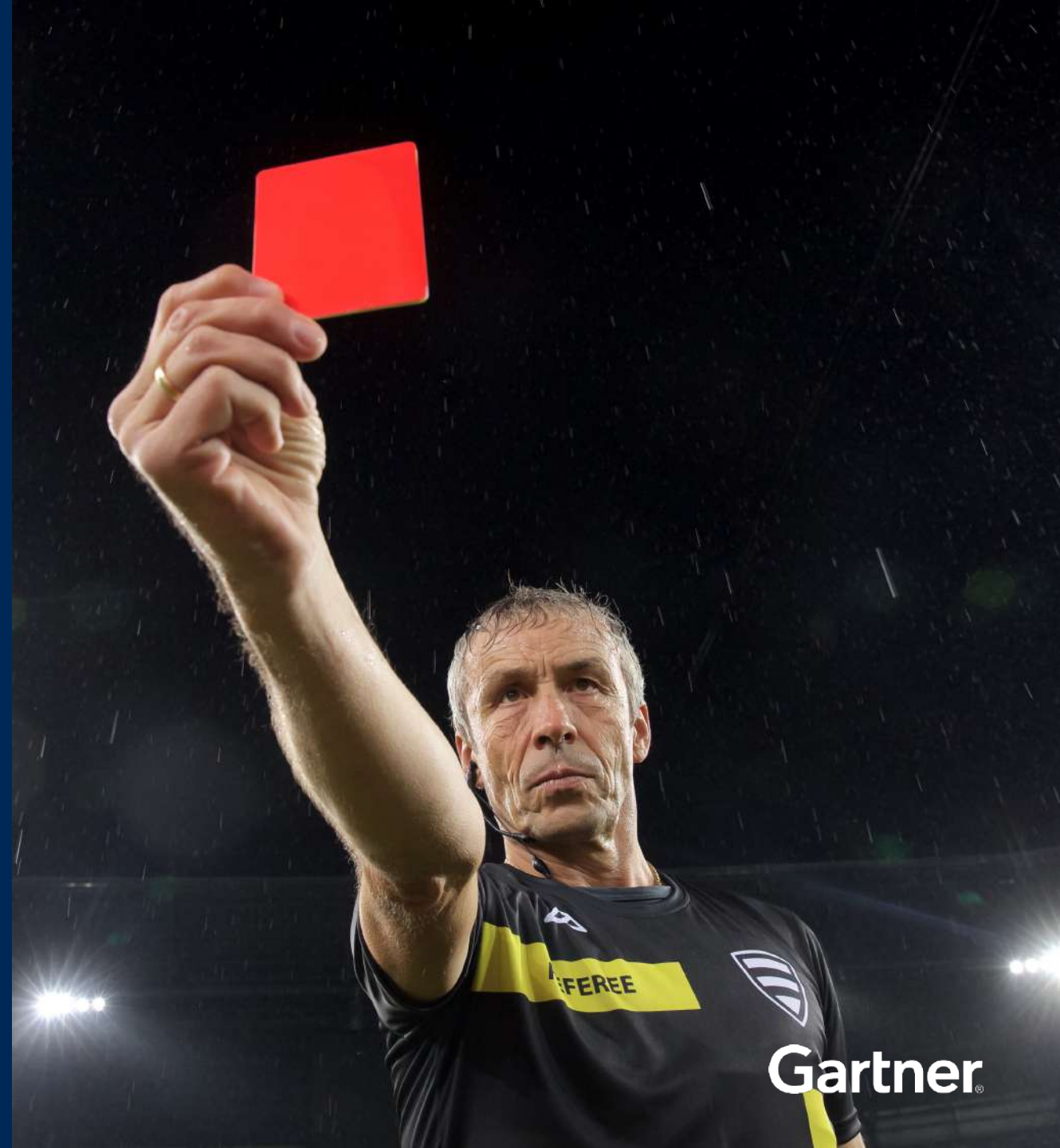
## Organization Imperative

- Invest in content moderation services, enforcement and reporting
- Collaborate for industry standard content tags

# Near-Term Flag

Through 2021, brands that create or commission content will develop industry standards for authentic content on brand-owned websites.

**Analysis:** Kyle Rees and Michael McGuire





**The Future Is Ours**



**¡Gracias!**  
por ser parte de la  
comunidad Innovar +



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