The Great Transformation?

Global COVID-19 Culture Assessment
“How wonderful it is that nobody need wait a single moment before starting to improve the world.”

— Anne Frank
1929 to 1945
Agenda

1. Introduction
2. The Survey
3. The Cultural Impact of COVID-19
4. What’s Needed to Recover and Thrive
5. Industry Stories
6. Social and Data Science
7. Questions and Call to action
Who We Are & Why

Why: To create a values-driven world where all **people, organisation and societies** thrive

What we do: Organisational **culture** analytics and **leadership** development

Where: Global presence: 8,000+ Certified Consultants in 100 Countries
Why Culture & Values Matter

We value what we need.

When life conditions change, the priority of our values and purpose also change.

Culture can be life enhancing or life depleting.

Societal and environmental sustainability require organisational sustainability.
Global COVID-19 Culture Assessment
Why

- How has the pandemic impacted the values and culture of organisations?
- What are the emerging priorities of governments, businesses, employees, and citizens?
- What is needed in order to recover and thrive?
Questions Asked

PERSONAL VALUES
• Please select ten of the following values/behaviours that most reflect who you are, not who you desire to become.

PRE-COVID CULTURE
• Please select ten of the values/behaviours that from your own experience, best describe how your organisation operated before the impact of COVID-19.

DURING COVID CULTURE
• Please select ten of the values/behaviours that from your own experience, best describe how your organisation is operating now, in the current COVID-19 climate.

POST COVID RECOVERY
• Please select ten of the values/behaviours that you believe are essential for your organisation to recover and thrive after COVID-19.
Who Responded

Number of participants: All 2,520 / Employed 1,387

Additional demographics: Industry (38), Gender, Key Worker, Work from Home
Survey dates: 21st April to 5th May
Rapid Transformation

Transformation that normally would have taken 5-7 years seemed to happen in just 6 weeks.
The Cultural Impact of COVID-19
Personal Values Shift

What is important to people now?

- Making a difference
- Adaptability
- Well-being
- Caring
- Continuous learning & Family*

*Jumped in priority
Personal Values Shift

All 2019 Surveys
- honesty
- accountability
- commitment
- positive attitude
- family
- respect
- humour/ fun
- continuous learning
- trust
- integrity

During COVID
- continuous learning
- family
- making a difference
- adaptability
- well-being
- positive attitude
- commitment
- accountability
- caring
- humour/ fun
New Organisational Experience

Performance → People focus
Control → Adaptability
Hierarchy → Working together
New Organisational Experience (detailed)

Pre-COVID Culture
- High performance focus
  Results orientation, Achievement, Financial stability
- Some sense of alignment
  Teamwork, Engagement, Commitment, Accountability
- Restrictive practices
  Bureaucracy, Control, Cost reduction

During COVID Culture
- Responding to changing needs
  Adaptability, Agility, Digital connectivity
- People focus
  Caring, Employee health, Balance (home/work)
- Working together
  Teamwork, Collaboration, Information sharing
Cultures are Healthier

Cultural Entropy declined from 20% to 17%.

Concerns have shifted.

Bureaucracy
Control
Hierarchy

Caution
Confusion
Job Insecurity
Concerns have shifted *(detailed)*

<table>
<thead>
<tr>
<th>Value</th>
<th>Pre-COVID Culture</th>
<th>During COVID Culture</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bureaucracy</td>
<td>#3</td>
<td>#52</td>
<td>-49</td>
</tr>
<tr>
<td>Hierarchy</td>
<td>#11</td>
<td>#46</td>
<td>-35</td>
</tr>
<tr>
<td>Control</td>
<td>#8</td>
<td>#33</td>
<td>-25</td>
</tr>
<tr>
<td>Caution</td>
<td>#75</td>
<td>#18</td>
<td>+57</td>
</tr>
<tr>
<td>Job Insecurity</td>
<td>#87</td>
<td>#26</td>
<td>+61</td>
</tr>
<tr>
<td>Confusion</td>
<td>#56</td>
<td>#29</td>
<td>+27</td>
</tr>
</tbody>
</table>
Barrett Model

**Contribution** - Living Purpose

**Collaboration** - Cultivating Communities

**Alignment** - Authentic Expression

**Evolution** - Courageously Evolving

**Performance** - Achieving Excellence

**Relationships** - Building Relationships

**Viability** - Ensuring stability

Purpose

Evolution

Foundation
Where is the energy now?

**Pre-COVID Culture**
- Teamwork: Level 4
- Results orientation: Level 3
- Bureaucracy (L): Level 3
- Financial stability: Level 1
- Cost reduction (L): Level 1
- Achievement: Level 3
- Accountability: Level 4
- Control (L): Level 1
- Commitment: Level 5
- Employee engagement: Level 5

**During COVID Culture**
- Adaptability: Level 4
- Digital connectivity: Level 3
- Cost reduction (L): Level 1
- Caring: Level 2
- Employee health: Level 1
- Teamwork: Level 4
- Information sharing: Level 4
- Agility: Level 4
- Balance (home/work): Level 4
- Cross group collaboration: Level 6

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# Largest Increases (detailed)

<table>
<thead>
<tr>
<th>Value</th>
<th>Pre-COVID Culture</th>
<th>During COVID Culture</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing well under pressure</td>
<td>#75</td>
<td>#18</td>
<td>+57</td>
</tr>
<tr>
<td>Information Sharing</td>
<td>#62</td>
<td>#7</td>
<td>+55</td>
</tr>
<tr>
<td>Resilience</td>
<td>#83</td>
<td>#30</td>
<td>+53</td>
</tr>
<tr>
<td>Digital Connectivity</td>
<td>#50</td>
<td>#2</td>
<td>+48</td>
</tr>
<tr>
<td>Employee Health</td>
<td>#61</td>
<td>#5</td>
<td>+46</td>
</tr>
<tr>
<td>Safety</td>
<td>#54</td>
<td>#13</td>
<td>+41</td>
</tr>
<tr>
<td>Well-Being</td>
<td>#57</td>
<td>#16</td>
<td>+41</td>
</tr>
<tr>
<td>Compassion</td>
<td>#67</td>
<td>#31</td>
<td>+36</td>
</tr>
<tr>
<td>Agility</td>
<td>#43</td>
<td>#8</td>
<td>+35</td>
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</tbody>
</table>
## Top Values Shifts

### Pre-COVID Culture

<table>
<thead>
<tr>
<th>Position</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>teamwork</td>
</tr>
<tr>
<td>2</td>
<td>results orientation</td>
</tr>
<tr>
<td>3</td>
<td>bureaucracy (L)</td>
</tr>
<tr>
<td>4</td>
<td>financial stability</td>
</tr>
<tr>
<td>5</td>
<td>cost reduction (L)</td>
</tr>
<tr>
<td>6</td>
<td>achievement</td>
</tr>
<tr>
<td>7</td>
<td>accountability</td>
</tr>
<tr>
<td>8</td>
<td>control (L)</td>
</tr>
<tr>
<td>9</td>
<td>commitment</td>
</tr>
<tr>
<td>10</td>
<td>employee engagement</td>
</tr>
<tr>
<td>11</td>
<td>hierarchy (L)</td>
</tr>
<tr>
<td>12</td>
<td>continuous improvement</td>
</tr>
<tr>
<td>13</td>
<td>organisational growth</td>
</tr>
<tr>
<td>14</td>
<td>brand image</td>
</tr>
<tr>
<td>15</td>
<td>making a difference</td>
</tr>
<tr>
<td>16</td>
<td>balance (home/work)</td>
</tr>
<tr>
<td>17</td>
<td>continuous learning</td>
</tr>
<tr>
<td>18</td>
<td>customer/ patient/ student satisfaction</td>
</tr>
<tr>
<td>19</td>
<td>long hours (L)</td>
</tr>
<tr>
<td>20</td>
<td>silo mentality (L)</td>
</tr>
</tbody>
</table>

### During COVID Culture

<table>
<thead>
<tr>
<th>Position</th>
<th>Shifts</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>☐</td>
<td>adaptability</td>
</tr>
<tr>
<td>2</td>
<td>☐</td>
<td>digital connectivity</td>
</tr>
<tr>
<td>3</td>
<td>☐</td>
<td>cost reduction (L)</td>
</tr>
<tr>
<td>4</td>
<td>☐</td>
<td>caring</td>
</tr>
<tr>
<td>5</td>
<td>☐</td>
<td>employee health</td>
</tr>
<tr>
<td>6</td>
<td>☐</td>
<td>teamwork</td>
</tr>
<tr>
<td>7</td>
<td>☐</td>
<td>information sharing</td>
</tr>
<tr>
<td>8</td>
<td>☐</td>
<td>agility</td>
</tr>
<tr>
<td>9</td>
<td>☐</td>
<td>balance (home/work)</td>
</tr>
<tr>
<td>10</td>
<td>☐</td>
<td>cross group collaboration</td>
</tr>
<tr>
<td>11</td>
<td>☐</td>
<td>managing well under pressure</td>
</tr>
<tr>
<td>12</td>
<td>☐</td>
<td>open communication</td>
</tr>
<tr>
<td>13</td>
<td>☐</td>
<td>safety</td>
</tr>
<tr>
<td>14</td>
<td>☐</td>
<td>continuous learning</td>
</tr>
<tr>
<td>15</td>
<td>☐</td>
<td>financial stability</td>
</tr>
<tr>
<td>16</td>
<td>☐</td>
<td>well-being (physical/ emotional/ mental/ spiritual)</td>
</tr>
<tr>
<td>17</td>
<td>☐</td>
<td>cooperation</td>
</tr>
<tr>
<td>18</td>
<td>☐</td>
<td>caution (L)</td>
</tr>
<tr>
<td>19</td>
<td>☐</td>
<td>commitment</td>
</tr>
<tr>
<td>20</td>
<td>☐</td>
<td>employee engagement</td>
</tr>
<tr>
<td>21</td>
<td>☐</td>
<td>positive attitude</td>
</tr>
</tbody>
</table>

**Values not among the top 20 values of During COVID Culture**

**New values appearing in During COVID Culture**
What’s Needed to Recover and Thrive
On the Right Track

Six values experienced during COVID are also requested going forward.

- Adaptability
- Agility
- Teamwork*
- Digital connectivity
- Balance (home/work)
- Cross group collaboration

*Consistent throughout
On the Right Track

During COVID Culture

- adaptability: Level 4
- digital connectivity: Level 3
- cost reduction (L): Level 1
- caring: Level 2
- employee health: Level 1
- teamwork: Level 4
- information sharing: Level 4
- agility: Level 4
- balance (home/work): Level 4
- cross group collaboration: Level 6

Post COVID Recovery

- adaptability: Level 4
- agility: Level 4
- employee engagement: Level 5
- teamwork: Level 4
- digital connectivity: Level 3
- balance (home/work): Level 4
- innovation: Level 4
- cross group collaboration: Level 6
- continuous learning: Level 4
- open communication: Level 2

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New Directions

The new values being requested going forward:

- Employee engagement*
- Innovation
- Continuous learning
- Open communication

*Top value Pre-COVID
Business Focus Areas

We can also better understand what is needed to recover and thrive by seeing where employees are asking for more focused energy.

- Finance & Effectiveness
- Agility & Innovation
- Employee Well-Being
- Trust & Engagement
- Direction & Communication
- Society & Sustainability
Shift in Business Focus

**PROCESS**
- Finance & Effectiveness: 25.5%
- Agility & Innovation: 15.9%

**PEOPLE**
- Trust & Engagement: 17.5%
- Employee Well-being: 16.9%

**PURPOSE**
- Direction & Communication: 12.4%
- Sustainability & Society: 11.7%

Thanks AxiaOrigin for the data analytics
Values that were prominent pre Covid-19, but are no longer as desired in a potential future?

- Results orientation: #58 down from #7
- Achievement: #71 down from #8
- Organisational Growth: #51 down from #11
- Customer satisfaction: #46 down from #13
- Brand image: #57 down from #5
- Professionalism: #64 down from #16
Which highly desired values were not prominent pre Covid-19?

- Adaptability: #1 up from #13
- Agility: #2 up from #36
- Digital Connectivity: #3 up from #62
- Innovation: #5 up from #43
- Creativity: #8 up from #23
Which highly desired values (under the current pandemic) were not prominent pre Covid-19?....

Caring: #3 up from #21
Wellbeing: #5 up from #24
Employee health: #7 up from #73
Safety: #18 up from #62

Which values are prominent under Covid-19, but are no longer as desired in a potential future?...

Caring: #25 down from #3
Employee health: #49 down from #7
Safety: #79 down from #18
Which highly desired values were not prominent pre Covid-19?

- Open communication: #14 up from #40
- Shared vision: #20 up from #63
- Long term perspective: #21 up from #64
Differing Priorities for Leaders & Employees

They are seeing the way to their ‘New Normal’ differently in terms of:

- Direction & Communication
- Agility & Innovation
- Trust & Engagement
- Sustainability & Society
### Differing Priorities for Leaders & Employees

<table>
<thead>
<tr>
<th>Process</th>
<th>People</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exec-C Suite</td>
<td>LEADERS</td>
<td>EMPLOYEES</td>
</tr>
<tr>
<td>Manager</td>
<td>EMPLOYEES</td>
<td>EMPLOYEES</td>
</tr>
<tr>
<td>Staff</td>
<td>EMPLOYEES</td>
<td>EMPLOYEES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Finance &amp; Effectiveness</th>
<th>Agility &amp; Innovation</th>
<th>Trust &amp; Engagement</th>
<th>Employee Well-being</th>
<th>Direction &amp; Communication</th>
<th>Sustainability &amp; Society</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>Green</td>
<td>Red</td>
<td>Green</td>
<td>Red</td>
<td>Red</td>
</tr>
</tbody>
</table>

Thanks AxiaOrgin for the data analytics.
There are 4 key areas where values are **diverging** between C-Suite Execs and their staff, as we look towards recovery.

1. **Agility & Innovation** are highly desired by C-Suite in the future relative to now, whereas these are less desired for Staff.

2. **Trust & Engagement** has less importance in the future for C-Suite, but is more highly valued in the desired state by Staff and Managers.

3. **Direction & Communication** are by far the most highly desired type of values in the desired future for Staff. Yet for C-Suite Execs, there is a negligible change from today’s position.

4. **Sustainability & Society** are among the most highly desired set of values for C-Suite Execs relative to the current situation. Yet for Staff, there is a negligible difference in their importance from today.

Thanks AxiaOrigin for the data analytics.
# Staff Desire for Leadership Direction & Communication (detailed)

<table>
<thead>
<tr>
<th>Value</th>
<th>During COVID Culture</th>
<th>Post COVID Recovery</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Vision</td>
<td>#94</td>
<td>#17</td>
<td>+77</td>
</tr>
<tr>
<td>Leadership Development</td>
<td>#95</td>
<td>#29</td>
<td>+66</td>
</tr>
<tr>
<td>Leading by Example</td>
<td>#67</td>
<td>#22</td>
<td>+45</td>
</tr>
<tr>
<td>Long-term Perspective</td>
<td>#70</td>
<td>#25</td>
<td>+45</td>
</tr>
<tr>
<td>Shared Values</td>
<td>#74</td>
<td>#35</td>
<td>+39</td>
</tr>
<tr>
<td>Open Communication</td>
<td>#22</td>
<td>#4</td>
<td>+16</td>
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</table>

Changes in Value Emphasis During COVID Culture to Post COVID Recovery
# Leaders’ Increased Focus on Sustainability (detailed)

<table>
<thead>
<tr>
<th>Value</th>
<th>During COVID Culture</th>
<th>Post COVID Recovery</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Future Generations</td>
<td>#90</td>
<td>#35</td>
<td>+55</td>
</tr>
<tr>
<td>Environmental Responsibility</td>
<td>#102</td>
<td>#65</td>
<td>+47</td>
</tr>
<tr>
<td>Strategic Alliances</td>
<td>#62</td>
<td>#21</td>
<td>+41</td>
</tr>
<tr>
<td>Sustainability</td>
<td>#87</td>
<td>#52</td>
<td>+35</td>
</tr>
<tr>
<td>Global Thinking</td>
<td>#45</td>
<td>#25</td>
<td>+20</td>
</tr>
</tbody>
</table>

Changes in Value Emphasis During COVID Culture to Post COVID Recovery
Industry Stories
Increased Confidence in Current Direction

+/- shift in alignment (values matches) between During COVID/Post COVID compared to Pre-COVID/Post COVID

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Banking, Finance, & Insurance

Pre-COVID Culture

- People operating in a restrictive environment
- Focus on traditional business metrics
- Opportunities for staff involvement

During COVID Culture

- Much less focus on monitoring and governance
- New ways of working
- Strong attention to looking after others

Post COVID Recovery

- Expanding call for change
- Desire for greater sense of connection
- Care for the whole person

What support is needed for a highly regulated industry to embrace new possibilities and empower employees?
Banking, Finance & Insurance

Pre-COVID Culture:
People operating in a restrictive environment (bureaucracy, control & compliance).
Focus on traditional business metrics (growth, finances, image, results).

During COVID Culture:
An apparent pause in business as usual: the culture has changed significantly.
Focus on monitoring and governance has all but disappeared, replaced by new ways of working (adaptability, digital connectivity).
Strong attention to looking after others (caring, employee health, social responsibility).

Post COVID Recovery:
Expand emphasis on change (adaptability, digital connectivity, agility, innovation).
A greater sense of involvement (accountability and employee engagement) bolstered in mutually beneficial exchanges (cross group collaboration and open communication).

What support is needed for a highly regulated industry to embrace new possibilities and empower employees?
IT & Computer

Pre-COVID Culture

• Organisations were on the right track
• Connection with their personal values
• Ability to contribute their ideas at work

During COVID Culture

• Confidence that they are moving in the right direction drops significantly
• Ability to respond takes priority
• Emphasis on people and communication increases

Post COVID Recovery

• Desire to return to exploration of big picture ideas
• Wish to create a common understanding of the way forward

What lessons can this group learn from past successes to help bridge to a new way of working?
Pre-COVID Culture:
Respondents felt their organisations were on the right track (7 values matches between Current and Desired Cultures). Making a difference and creativity are of personal importance to this group, and they were able to contribute their ideas at work (employee engagement, continuous improvement, innovation, teamwork, and global thinking).

During COVID Culture:
Confidence that they are moving in the right direction drops significantly. Emphasis on people and communication increases (caring, cooperation, open communication).

Post COVID Recovery:
Desire to return to many of the top values they held previously, as well as to create a common understanding of the way forward (shared vision).

What lessons can this group learn from past successes to help bridge to a new way of working?
Consultancy & Management

Pre-COVID Culture

• Highly driven people
• Strong emphasis on developing others

During COVID Culture

• Increase in focus on finances
• Attention to looking after themselves and others
• Bringing their sense of optimism and using this to try new approaches

Post COVID Recovery

• Call for more sustainable and resilient approach
• Strong emphasis on generating new ideas and ways of working

How might this industry see an opportunity to use the present challenges as a catalyst for evolution?
Consultancy & Management

Pre-COVID Culture:
Highly driven people (commitment, achievement, making a difference).
The values are typical of the industry (leadership development, coaching/mentoring).

During COVID Culture:
Understandable increase in focus on finances (cost reduction and financial stability).
Attention to looking after themselves and others (caring, well-being (physical, emotional, mental, spiritual)).
They are bringing their sense of optimism (positive attitude) and are using this time to try new approaches (adaptability, agility, digital connectivity).

Post COVID Recovery:
A desire for a more sustainable and resilient approach (strategic alliances, well-being, financial stability).
Strong emphasis on generating new ideas and ways of working (innovation, creativity and continue with adaptability, agility and digital connectivity).

How might this industry see an opportunity to use the present challenges as a catalyst for evolution?
Other Industry Headlines
Post COVID Recovery

Government – Responsive and effective approach

Nonprofit – Positive internal focus

Agriculture & Forestry – Build knowledge and deepen their connections

Consultancy & Management – New ideas and ongoing learning

Manufacturing – Look after both people and profit
Social and Data Science

AxiaOrigin
Adapting to the new normal: among both C-Suite Execs and the general public, Open and Social data suggests a deflated interest in longer-term sustainability related needs

Some key insights from Open and Social data:

1. When it comes to sustainability (and related) topics, C-Suite sentiment across open and social media is now negative towards longer-term needs, and positive towards immediate needs.

2. Interest in longer-term sustainability (and related) topics across all online searches among the general public has fallen dramatically.

We will follow up in the coming days with some digital content providing more detailed insight into:

3. General public attitudes towards a range of “longer-term need” topics
4. General public shift towards “immediate need” topics
5. Breakdown in C-Suite conversations for “longer-term need” topics
6. C-Suite shift in frequency of conversations for “immediate need” topics
7. More insights into the COVID-19 survey data
When it comes to sustainability (and related) topics, C-Suite sentiment across open and social media is now negative towards longer-term needs, and positive towards immediate needs.

There has been a negative shift in “longer-term need” topics...

1 Sustainability
2 Future generations
3 Human rights

There has been a positive shift in “immediate need” topics...

4 Compassion
5 Power

Sample = 21,288 C-Suite executives globally
Pre COVID 19 date range: 16th October 2019 – 1st January 2020
During COVID 19 date range: 27th February – 15th May
Interest in longer-term sustainability (and related) topics across all online searches among the general public has fallen dramatically.

Sustainability & Society search terms include longer-term needs:
- Climate Change
- Gender Equality
- Human Rights
- Sustainable Development Goals (SDGs)
- Poverty

Employee Wellbeing search terms include immediate needs:
- Employee Mental Health
- Employee Physical Health
- Employee Safety
- Employee Wellness
Questions and Call to Action
The foundation of organisational sustainability is personal sustainability.

The foundation of societal sustainability is organisational sustainability.
Questions for the Future

People/organisations value what they need.

- What do your stakeholders need now?
- What are your organisational needs?
- What is society and the planet calling for?
- How do we re-align our purpose and core business to needs of the present without compromising the ability of future generations to meet their own needs?
- How does our culture contribute to co-creating the new normal?
Thank You

And a huge thank you to everyone who has given their time, energy, commitment, and passion to make this happen.