

Digital, Disparate, And Disengaged

Bridging The Technology Gap
Between In-Office And Remote
Workers

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Executive Summary

The mobile revolution has transformed the way employees work, making work an activity that can be conducted in many contexts rather than a “place” you go. But back at the office, the revolution remains incomplete: Workers find in-office technologies stunted and ineffective, to the surprise of technology managers providing the solutions. Most offices lack compelling solutions for collaborating with colleagues, customers, and business partners, any of whom might be in person or remote at any given time.

In January 2016, Prysm commissioned Forrester Consulting to evaluate the adoption and use of collaboration technologies and tools in the enterprise. Then to further explore this trend, Forrester developed a hypothesis that tested the assertion that there is significant latent demand for improved collaboration solutions that employ large-scale, interactive displays; new kinds of collaboration spaces; and collaboration technologies. We predicted that workers — who are more mobile than ever — would be receptive to these new approaches to making them more effective at the office.

Eighty-three percent of information workers said they can be productive with the right collaboration tools regardless of location.

To explore this concept, Forrester conducted in-depth, quantitative surveys across two distinct groups: 800 information workers and 200 IT and facilities professionals at organizations with 1,000 or more employees.¹ Respondents for both groups were equally split between the US and the UK. The surveys revealed that while IT and facilities workers perceive that their organizations are providing employees with the space and tools needed to collaborate, information workers find their current tools insufficient.

KEY FINDINGS

Forrester’s study yielded four key findings:

› **Today’s untethered employees are abandoning the “place” in “workplace.”** In fact, fewer and fewer of them see “work” as a place at all — it’s any place, accessed at any time, using a variety of mobile devices. And while this increased mobility has connected employees to a network of collaborators — including co-workers, customers, and

business partners — in once unprecedented ways, that network is vast and growing, and it is changing the nature of their work and the expectations they have of the tools at our disposal.

› **Disconnected workers are frustrated workers.**

Effective communication is critical for today’s modern workforce. Respondents in our study estimated that 49% of meetings depend on technology to connect colleagues and partners near and far. However, nearly all reported challenges with their company’s collaboration application and technology tools. Keeping all participants engaged is a common problem, and remote workers are even more susceptible to feeling disconnected. These barriers hurt employees’ day-to-day productivity and are leaving them feeling frustrated and ineffective.

› **Collaboration technology investments are failing.** Our

study found that IT and facilities workers consistently underestimate the challenges and overestimate the effectiveness of technology-enabled meetings at their companies. And while nearly all workers surveyed have access to modern tools, they’re not using them with the frequency that IT and facilities workers expect. Given that both groups agree on the potential revenue, product development, and time-to-market gains that modern collaboration solutions can provide, frustrated employees aren’t the only cost associated with ineffective collaboration tools — companies are leaving money on the table from lost innovation and delays.

› **Next-generation collaboration technologies will boost employee engagement.** IT, facilities, and information

workers in our study have an appetite for enhanced collaboration capabilities, which our research suggests can improve productivity, engagement, and business initiatives, as well as staff growth and retention. Now is the time to benchmark your firm’s collaboration efforts and evaluate if your in-office technologies have kept pace with the mobile revolution.

Mobile Has Changed The Definition Of “Work”

In the not-too-distant past, “going to work” meant going to an office, putting in the requisite 40 hours a week while sitting at a desk, and typing away on a PC. The modern workday, however, is no longer restricted to a particular timeframe, device, or location. Today’s information workers have been liberated from their desks and are highly mobile, using multiple devices from different locations to do their jobs.

Enterprises need to evolve their strategies to address this mobile mind shift — the expectation from customers and employees alike that they can get what they want in their immediate context and moments of need.² According to Forrester’s Business Technographics® Global Priorities And Journey Survey, 2015, enterprises are making mobile a priority: Expanding mobile strategy internally and externally (78%) and creating a comprehensive mobile and tablet strategy (73%) ranked high on the list of priorities for the year.³

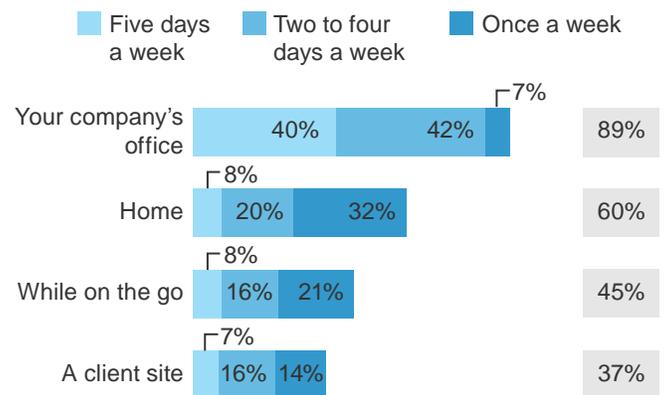
In our custom survey of information workers, we found that this increased mobility has essentially broken down the physical walls of the workplace, changing not only how employees work but the very definition of “work.” Our study found that:

- › **Desktops are out; mobile is in.** The desktop — once a common fixture in offices — is no longer the predominant device for getting work done. The majority (77%) of information workers we surveyed are using laptops on a daily basis, while just over half (54%) are working on desktops. In fact, most workers are using their laptops in conjunction with another mobile device: 58% are using a smartphone or tablet in addition to their laptop to do work. Millennials and Gen X workers are leading the mobile charge, with six out of 10 taking a largely mobile approach to work, compared with fewer than half of Boomers.⁴
- › **Workers are getting out of the office.** Just 52% of information workers consider “work” a physical place they go to for a fixed period of time, and only 57% look forward to working in their company’s office. That said, workers have not completely abandoned the office — just don’t expect to see them at their desk every day. Eighty-nine percent of information workers work from their company’s office at least once a week, but just 40% go in five days a week. In fact, the IT and facilities professionals we surveyed reported that an average of 32% of employees

work remotely on a full-time basis. In this expanded workplace, enterprise employees are working from home (60%), on the go (45%), or at a client site (37%) one or more days a week (see Figure 1).

FIGURE 1
“Work” Is No Longer Relegated To A Physical Office

“Considering your work habits over a typical month, how often do you work from the following locations?”



Base: 800 information workers from large enterprises (1,000+ employees) in the US and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Prysm, March 2016

- › **“Work” is a function, not a place.** Workers are no longer punching the clock. They’re doing their jobs whether they’re in or out of the office and both during and outside of business hours. Two-thirds of information workers consider work something they do constantly, regardless of time or location. And the key to getting that work done is having the right technology. Eighty-three percent said that if they have the right collaboration tools, they can be productive, regardless of time or location.

The Collaboration Conundrum

But back at the office, technology hasn’t caught up with the mobile revolution. While workers make do, they’re not finding the tools for in-office collaboration to be as powerful or world-changing as their experience when remote.

In today’s enterprise, very few work in isolation. Our survey found that information workers are regularly collaborating not only with people inside their own office, but with

colleagues in other offices or working remotely, external business partners, and customers. In order to help employees share information, coordinate projects, discuss best practices, and build communities within and across the enterprise, many organizations are investing in enterprise collaboration technologies. The collaboration market is estimated at \$4 billion globally.⁵

But it's not enough to invest in the technology — it's critical that organizations have a clear view of how employees are working and what they need in order to be successful.

THE PERCEPTION GAP

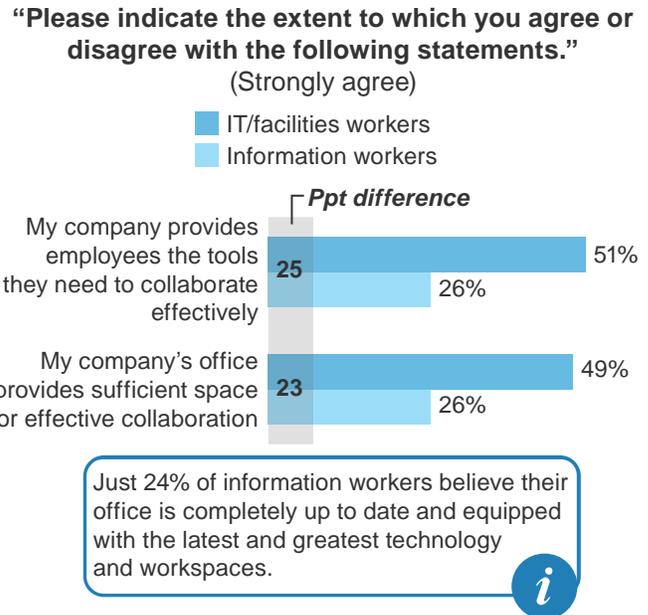
Information workers must work with a broad and diverse cast of characters on a day-to-day basis. While the majority collaborate with six or more internal colleagues — either in their own office (80%) or in another company office (64%) — many are regularly communicating with just as many customers (62%), partners (46%), or remote employees (46%). Finding a way to work with both face-to-face and virtual stakeholders can often go beyond the capabilities of a simple audioconference: On average, 49% of team meetings are technology-enabled, utilizing videoconferencing, webconferencing, digital whiteboards, and other collaboration technologies.

Workers don't feel that their companies are adequately prioritizing initiatives that will improve the way they work.

But are the tools and environments that enterprises are providing their employees sufficient? If you ask IT and facilities workers, the answer is "yes." About half strongly agreed with the statements, "My company provides employees the tools they need to collaborate effectively" and "My company's office provides sufficient space for effective collaboration." Information workers, however, tell a different story — just one-quarter are in agreement (see Figure 2). Further, few consider their office to be state of the art. Just 24% believe their office is completely up to date and equipped with the latest and greatest technology and workspaces.

Part of the issue is that information workers don't feel that their companies are adequately prioritizing initiatives that will improve the way they work, while IT and facilities workers believe these initiatives are getting sufficient focus. While a large majority of IT and facilities pros said their organizations are making employee productivity (88%), engagement (77%), collaboration (74%), and innovation

FIGURE 2
A Difference In Perspective

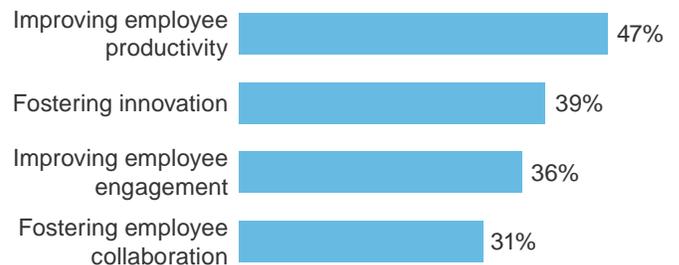


Base: 200 IT and facilities workers and 800 information workers from large enterprises (1,000+ employees) in the US and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Prysm, March 2016

FIGURE 3
Money Talks . . .

“What level of investment is your company making in technologies and tools to support these initiatives?”
(Significant investment)



Base: 197 IT and facilities workers from large enterprises (1,000+ employees) in the US and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Prysm, March 2016

(72%) a high or top priority, information workers have a dimmer view, trailing their IT and facilities counterparts by about a 20-percentage-point margin in each of these areas. And despite their sunny outlook on these initiatives, IT and facilities respondents have a different story to tell when it comes to backing these priorities up with hard dollars: Fewer than half reported that their organizations are making significant investments in the technologies and tools to support these initiatives (see Figure 3).

EXISTING TOOLS ARE UNDERUTILIZED AND INEFFICIENT

But money is just part of the equation. Regardless of the investment you make in collaboration tools and technologies, if your employees don't use them, there is very little chance you'll be able to effect workflow and collaboration improvements. The information workers we surveyed have a host of tools and applications at their disposal, but — outside of traditional methods like audioconference, webconference, or file sharing — these technologies, applications, and services aren't being widely

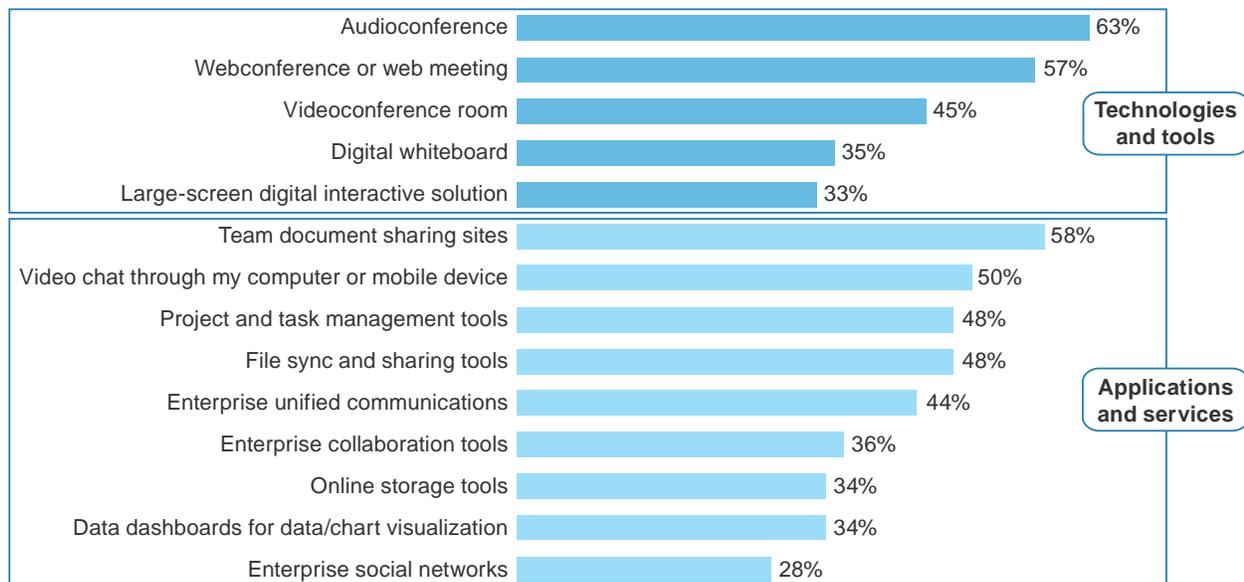
utilized (see Figure 4).

With all of these tools at their disposal and a clear need to work with constituencies both within and outside the organization, what is holding information workers back? Simply put, the workers find their current collaboration tools aren't enabling collaboration. According to the information workers we surveyed:

- › **Tools are ineffective.** Enterprises invest in collaboration tools with the hope that these tools will improve employees' abilities to work with both internal and external teams. While 57% of information workers find videoconference rooms very or extremely effective in fostering team collaboration, fewer feel that audioconferencing (51%), digital whiteboards (51%), large-screen digital interactive solutions (42%), or webconferencing (38%) are meeting their needs.
- › **Existing collaboration applications and services fall short.** The picture is even grimmer for technologies like team document sharing sites, project and task management tools, and data dashboards. Fewer than half

FIGURE 4
Employees Aren't Getting The Most Out Of Collaboration Tools And Applications

"To what extent do you and your team use the following technologies, tools, applications, and services for collaboration?"
(Always or often)



Base: 800 information workers from large enterprises (1,000+ employees) in the US and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Prysm, March 2016

of information workers reported that the collaboration applications and services they use enable effective, real-time collaboration during meetings all or most of the time.

This begs the question, if your organization is rolling out collaboration solutions to workers, but they're not functioning or being used to their fullest potential, are you getting the return on your investment? Is it worthwhile? Unfortunately, many organizations struggle with implementing collaboration technologies: According to a 2013 Forrester study on business agility, just 40% of surveyed companies had successfully deployed enterprise collaboration.⁶ This presents a considerable challenge for organizations as they try to build a workforce equipped to work with an extended ecosystem of internal and external partners.

THE DISENGAGED EMPLOYEE

In today's workplace, it's critical for employees to effectively communicate and work with colleagues and partners. Collaboration solutions are designed to build a bridge between team members – whether they're sitting in the next cubicle or across the country. However, if these solutions don't meet workers' needs or aren't used, that bridge can crumble.

One of the key challenges working teams face is keeping all parties engaged. This is the No. 1 challenge when conducting tech-enabled meetings, cited by 45% of information workers (see Figure 5). The average meeting attendee is only partially engaged; those fully paying attention are in the minority. Whether in the office or remote, fewer than half of the information workers we surveyed reported that they are 100% attentive and actively participate in meetings, while about half said their attention wanders. Remote workers are more likely to feel disconnected — 11% said it's difficult to pay attention and they are more of an observer than a participant, while just 2% attending a meeting in the office have the same struggle. Indeed, 36% reported that remote participants feel disconnected from the onsite team.

Collaboration solutions are designed to build a bridge between team members — whether they're sitting in the next cubicle or across the country.

These engagement challenges, in addition to issues with sharing and effectively using information shared in meetings, create an environment where workers are frustrated, less productive, and inefficient:

FIGURE 5
Information Workers Encounter Engagement Challenges In Tech-Enabled Meetings



Base: 800 information workers from large enterprises (1,000+ employees) in the US and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Pysm, March 2016

FIGURE 6
Collaboration Challenges Lead To Disengagement, Frustration, And A Loss Of Productivity



Base: 728 information workers from large enterprises (1,000+ employees) in the US and the UK experiencing challenges with tech-enabled meetings
 Source: A commissioned study conducted by Forrester Consulting on behalf of Prysm, March 2016

- › **The mental impact.** When information workers encounter challenges with utilizing technology to engage with their teams, it can take a toll on the whole team. Forty-two percent reported that team members feel disengaged, 40% said team members get frustrated, and 19% reported a decline in team morale.
- › **The impact on efficiency.** These challenges can also have a negative impact on team projects and initiatives. Teams waste time reviewing information previously shared (33%), lose meeting input and feedback (31%), and take longer to make decisions (32%), making them less productive and potentially pushing out timelines (see Figure 6).

Collaboration challenges and their impact on employees can have far-reaching implications. Forrester’s research draws a correlation between an enterprise’s use of collaboration with stronger economic performance.⁷ But if

your organization isn’t collaborating effectively, the outlook may not be quite as bright.

Empowering A Modern Workforce With Next-Generation Technology

These collaboration issues need to be solved, and IT and facilities professionals are feeling the heat: 75% said their executives and line-of-business leaders are putting moderate to extreme pressure on them to create or implement innovative collaboration solutions for employees. In order to rise to the challenge, IT and facilities decision-makers need to start thinking outside of the box.

IT and facilities professionals are feeling the heat — business leaders are putting pressure on them to create or implement collaboration solutions for employees.

When presented with several enhanced collaboration capabilities — ranging from an interactive digital workspace for data visualization to a workspace where applications, content, videoconferencing, and the web are combined into a single system — IT and facilities pros were intrigued, expressing a high level of interest in all features (see Figure 7). Similarly, information workers recognized how these capabilities could improve the way they work, with the majority indicating the features offered would boost collaboration. When asked about the potential impact a modern, digital workspace with all of these features could have on their organization, both groups identified key benefits (see Figure 8):

- › **Productivity and engagement.** Nearly nine out of 10 IT and facilities pros and eight out of 10 information workers saw the potential for this type of solution to improve collaboration, productivity, and employee engagement. Eighty percent of both groups felt this type of solution would improve decision-making.
- › **Business acceleration.** A modern, digital workspace also has the potential to have an impact on broader business goals. Over three-quarters of IT and facilities respondents and over half of information workers reported the solution could help their organizations make strides in product development, grow revenue, and speed time-to-market.

FIGURE 7

Next-Generation Collaboration Features Appeal To Workers And Decision-Makers Alike

Collaboration features	Impact on ability to collaborate (somewhat or significantly improve)	Interest level (very or extremely interested)
	Information workers	IT and facilities workers
A workspace where your team can create, edit, and share content and ideas	70%	77%
A workspace where applications, content, videoconferencing, and the web are combined into a single system	69%	76%
Ability to collaborate in real time across multiple sites and systems	68%	82%
Ability to pull up a digital whiteboard within a workspace to take notes, brainstorm, or draw free-form sketches	67%	77%
Ability to save, store, and organize meetings in a public or private cloud for ease of sharing, access, and review	67%	77%
Ability to take a snapshot of content shared at meetings — even video — and share it via email	65%	75%
Ability to display, resize, position, annotate streaming video, web apps, documents, presentations, images, and inputs from laptops and mobile device	62%	76%
A robust, interactive workspace for data visualization	62%	75%
Availability of on-screen controls to make video calls, control a camera, adjust volume, and size and position on-screen keyboard	61%	74%
Ability to access an on-screen keyboard within a workspace to type notes or input text	61%	69%
Scalable touch-interactive displays (from mobile, to home office, to conference room)	57%	70%

Base: 200 IT and facilities workers and 800 information workers from large enterprises (1,000+ employees) in the US and the UK

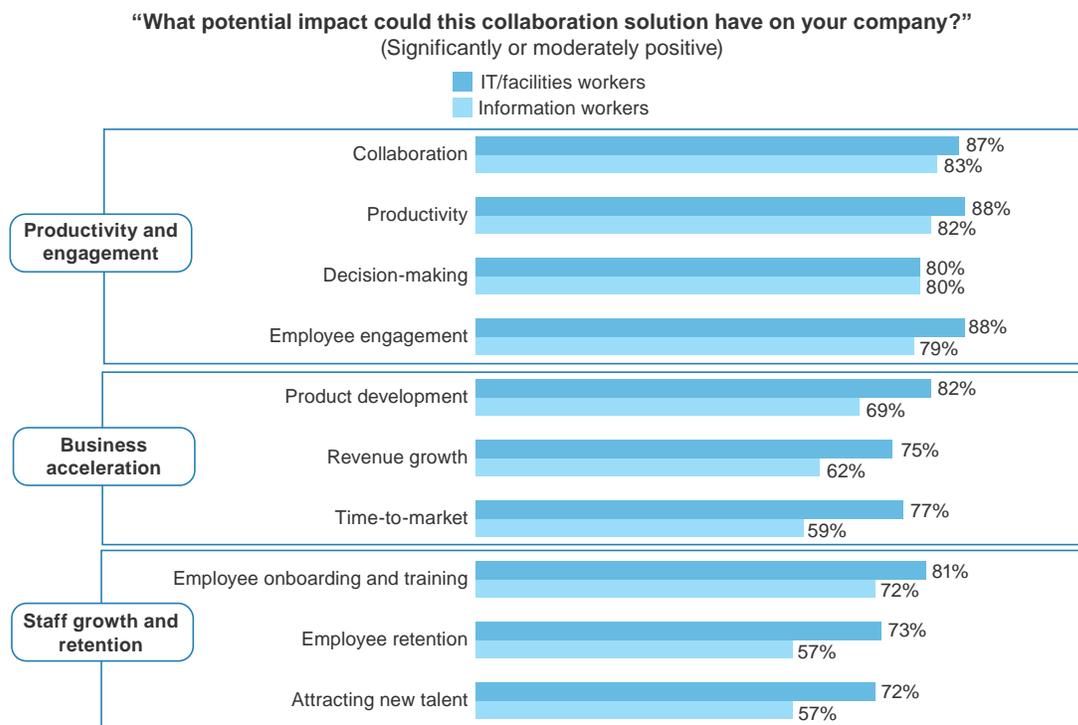
Source: A commissioned study conducted by Forrester Consulting on behalf of Prysm, March 2016

› **Staff growth and retention.** There is also the opportunity to leverage a digital workspace to grow, retain, and train the workforce. Modern collaboration technology can make organizations more attractive to potential hires, reflecting an environment that values innovation and an empowered workforce. This technology can also lead to improvements in employee onboarding and training, providing new hires with a more engaging learning experience and existing employees with the ability to interact with training materials. Further, the majority of both IT and facilities pros and information workers surveyed indicated a solution with next-level collaboration features would improve employee retention. In fact, 71% of information workers said they would be somewhat or much more likely to remain at their company if investments were made in a modern, digital collaboration

solution. Millennials, in particular, were more likely to see this technology investment as an incentive to stay put — 81% said they would stay at their job, compared with 73% of Gen Xers and 57% of Boomers. Attracting, developing, and retaining key talent is critical to both workflow continuity as well as building a workforce equipped to excel in the extended collaboration ecosystem of today's enterprise.

Perhaps the best way to judge whether next-generation collaboration technologies will be valuable is to ask the people who will be using them. We've done that here. Workers, IT leaders, and facilities managers agree that in-office technology featuring a large touchscreen display that combines applications, content, videoconferencing, and the web into a single system will drive productivity, quality, business goals, and improved hiring and retention. In an era when work happens anytime, anywhere, there's a need for next-generation technology that can empower collaboration and co-creation among employees, customers, and partners both in the office and wherever they might be.

FIGURE 8
Potential Impact Of A Next-Generation Digital Collaboration Solution



Base: 200 IT and facilities workers and 800 information workers from large enterprises (1,000+ employees) in the US and the UK

Source: A commissioned study conducted by Forrester Consulting on behalf of Prysm, March 2016

Key Recommendations

The mobile mind shift has occurred, and workers are more effective than ever when on the road or in remote locations. Now it's time for a shift of in-office technologies, which haven't kept pace with the mobile revolution. To fill this gap, you'll want to explore next-generation collaboration solutions. Forrester's surveys of workers, IT leaders, and facilities managers suggests that these solutions can drive productivity, effectiveness, and employee retention. To succeed with next-generation collaboration solutions:

- › **Benchmark your own employee trends.** Respondents to our survey overwhelmingly found gaps between today's technology and the promise of next-generation solutions. What about your employees? Structured surveys and focus groups can reveal missing links, and pilot tests can help assess enthusiasm and use cases for next-generation products.
- › **Build a business case.** Once you've identified that employees have a need, you'll want to get group leaders from different functions like HR, IT, facilities, and key business units together to start building a business case to share with wider audiences. What are the likely benefits (some of which are laid out in this paper)? Costs? Which business outcomes can be positively affected? Constructing this analysis will help you put into place appropriate expectations about what the next-generation collaboration solution can and cannot do.
- › **Embrace a comprehensive solution.** A solution that empowers increasingly remote employees, customers, and partners while also improving the in-office collaboration experience will drive the most value, according to our study. Look for large, touchscreen-enabled devices with strong links to remote collaboration.

Appendix A: Methodology

For this study, Forrester conducted two online surveys of workers at large organizations (1,000 or more employees) in the US and the UK: one of 200 IT and facilities professionals and the other of 800 information workers. IT and facilities respondents were at the director level and above, responsible for making investment, purchase, and/or implementation decisions for collaboration tools and technologies. Information workers had to be full-time employees (30 or more hours a week) working outside of their company's office at least twice a month and using a desktop, laptop, tablet, and/or smartphone for work on a daily basis. The surveys examined practices, preferences, and experiences with collaboration tools and technologies. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in February 2016 and was completed in March 2016.

Appendix B: Supplemental Material

RELATED FORRESTER RESEARCH

"Elevate Human Performance With Workforce Enablement," Forrester Research, Inc., May 2, 2016

"How To Spur Collaboration Across Your Customer Experience Ecosystem," Forrester Research, Inc., April 11, 2016

"Seven New Buying Patterns Reshape The 2017 Enterprise Collaboration Market," Forrester Research, Inc., March 4, 2016

"Harness The Potential Of Millennials With Your Workforce Technology Strategy," Forrester Research, Inc., February 2, 2016

"The Digital Signage And Display Opportunity In 2016," Forrester Research, Inc., January 4, 2016

"Predictions 2016: Seven Gains In Workforce Tech," Forrester Research, Inc., November 16, 2015

Appendix C: Endnotes

¹ In order to screen into the information workers study, respondents had to work full time (30 or more hours a week); work outside of their office at least twice a month; and use, at the minimum, a desktop or laptop on a daily basis. Respondents to the IT and facilities study were at the director level and above with responsibility for making investment, purchase, and/or implementation decisions for collaboration tools and technologies.

² Source: Ted Schadler, Josh Bernoff, and Julie Ask, *The Mobile Mind Shift: Engineer Your Business to Win in the Mobile Moment*, Groundswell Press, 2014.

³ Base: Global technology and business decision-makers at organizations with 1,000 or more employees.

⁴ For the purpose of the information workers study, Millennials are defined as those between the ages of 18 and 34, Gen Xers are age 35 to 49, and Boomers are age 50 or older.

⁵ Learn more about global technology spending for 2016 and how Forrester's market outlook can help shape your spending plans and requests. Source: "The Global Tech Market Outlook For 2015 To 2016," Forrester Research, Inc., January 7, 2015.

⁶ Source: Forrester's Q3 2013 US Business Agility Online Survey.

⁷ Source: Forrester's Q3 2013 US Business Agility Online Survey.