

July 2019

Exploring The Role Of Monitors In Improving Employee Experience

An Analysis On How Monitors And Their Features Enable Employee Experience For Business Growth

INTRODUCTION

In today's ever-competitive business landscape, organizations are in a constant battle to differentiate themselves in their capabilities and services to their customers. In this light, customer experience (CX) has become a vital focus area for business and technology leaders to address because of its direct impact on business growth. While there is merit in investing in external offerings for bettering customer experience and service capabilities, looking internally at shaping the right experience for those who serve these customers — the employees — is just as important. Technology plays an important part in enabling CX improvement, both internally and externally.

Nonetheless, improving CX moves beyond internal enablers of employee productivity and extends to the larger scope of improving employee experience (EX) as a whole. With positive EX in an organization, employees are likely to be more engaged and deliver an experience that customers will remember positively.¹ To improve their customer experience, organizations must focus on improving their employee experience as well.

In 2019, Dell commissioned Forrester Consulting to explore this correlation further to specifically understand the role investment in monitors has in improving EX. Forrester conducted three online surveys of 450 respondents in total, consisting of employees (knowledge workers predominantly using monitors at work), employers (business and technology leaders involved in IT buying decisions) and healthcare professionals/office-planning professionals respectively. By surveying three distinct survey groups, we were able to explore specific insights from each audience group. From employees, we understood the end user perspective on the benefits of monitors in everyday work. Similarly, from employers, we were able to explore the relevance of monitors as drivers of productivity and efficiency, and further validate these perspectives from a healthcare/office planning professional's standpoint through a survey as well as qualitative interviews, to understand whether monitors have an impact on the health and well-being of users as well.



Monitors are the No.1 driver for employee productivity



58% of employees believe improved EX will help them serve customers better.

For each of the surveys, there was an equal bearing of respondents from the US, the UK, and China respectively. The employer and employee respondents were from medium-sized businesses (annual revenue of USD \$50,000 to \$1 million), commercial companies (annual revenue of USD \$1 million to \$50 million), and large enterprises (annual revenue of USD \$50 million and above). The findings of the survey demonstrated that specific monitor features improved EX by improving employee productivity, improving their well-being, and inducing a sense that the company cares about their needs. Monitors came through as the most important component of a workspace, especially in considering its ergonomic features, that better employee experience, while connectivity and front-of-screen experience of monitors contributed to various factors of improving EX as well.

KEY FINDINGS

- › **Enterprises yet to fully recognize the impact of EX on CX.** While 58% of employees surveyed believe that a strong EX would improve their ability to serve customers better, only 47% of employers believe that a positive EX will have a high or critical impact on improving CX. This shows that there is a clear disconnect, when it comes to prioritizing employee experience in organizations. More needs to be done to create awareness around EX and its impact on CX improvements.
- › **Workspace features can enable better EX.** Aspects of the employee workspace, specifically its ergonomics characteristics, impact EX and the way employees work and feel at the workplace. Seventy-five percent of employees believe that having a conducive workspace improves their health and well-being; 61% think it improves productivity. Within the workspace, 96% believe that adjustable monitors are the most important feature to consider for them to do their jobs effectively.
- › **Specific monitor features drive significant improvements in EX.** To effectively improve employee experience, organizations need to think beyond ergonomics improvements and also consider how front of screen and connectivity features of monitors further drive a better experience for employees. Eighty-eight percent of employees believe that aspects like better resolution would improve productivity, further validated by 66% of healthcare professionals who also believe this would have a critical impact on the workplace. Furthermore, 73% of employees believe connectivity features (USB-C) have positive impact on their productivity.



96% of employees consider monitors as the most important feature of their workspace.

Extending The CX Conversation To EX

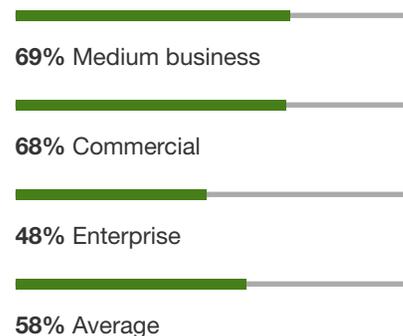
Organizations understand that the customer is key; improving CX is crucial because of the direct impact it has on business growth. To improve CX holistically, the link between EX and CX is paramount now more than ever because an engaged employee base leads to delivering a service with which customers are more satisfied. As a Dell study in 2013 suggested, highly engaged employees were delivering Net Promoter Scores that were twice as high as lower engaged employees.² Senior executives responsible for CX initiatives in their organizations are playing a bigger role in improving the EX of their companies, as they are seeing the value it can bring to the business. Companies that are investing in EX see it as a differentiator in bringing more revenue and better customer satisfaction.³ In surveying the employer, employee, and healthcare/office-planning professionals group, we found that:

- › **Employees concur that better EX makes them serve better.** Fifty-eight percent of employees overall believe that strong EX will improve their ability to serve their customers better. In fact, more than two-thirds of medium and commercial business employees and nearly half of enterprise employees in our survey confirmed that positive EX will help augment their customer service capabilities (see Figure 1). This is further supported in markets like China and US, where 64% of employees overall agree that strong EX leads to CX.
- › **Employers have a moderate understanding of EX's impact on CX.** Forty-seven percent of employers believe that positive EX will have a high or critical impact on improving CX. However, this significantly varies across markets. Our survey found that 60% of employers in US believe that positive EX leads to better CX, versus 34% and 48% in China and the UK, respectively.
- › **Organizations have a restricted view that EX mainly impacts employee retention and performance.** Eighty-two percent of employers believe that EX leads to better productivity among employees. However, they are yet to make the connection holistically that an engaged employee base leads to an engaged customer base too.
- › **More needs to be done by organizations to prioritize EX with equal importance to CX in their overall business priorities.** According to our survey of technology and business leaders, 71% of employers consider improving CX as part of their top three business priorities, while only 35% consider improving EX in the same regard (see Figure 2). Helping organizations recognize the positive impact that EX can have on customer experience will help build EX as a priority overall.

Through this study, we aim to dive deeper into employee experience and understand why organizations should focus on EX for its inadvertent importance in improving customer experience. In exploring this further, we will look at the role monitors play in impacting specific factors of EX. With this, we would dig deeper into the notion that monitors can eventually impact CX, not only because of its impact on productivity, but also on improving EX as well.

Figure 1

“Percentage of employees who agree that positive EX will improve their ability to serve customers”



Base: 150 professionals across China, the UK, and the US

Note: Medium: USD \$50,000 to \$1M;

Commercial: USD \$1M to \$50M;

Enterprise: > USD \$50M

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, June 2019

Figure 2

“Which of the following initiatives are likely to be your organization’s top business priorities over the next 12 months?”



Base: 150 professionals across China, the UK, and the US

Note: Not all responses are shown; showing percentage of employers selecting top three business priorities

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, June 2019

Organizations have yet to realize the correlation between EX and CX in their business priorities.

Factors That Impact EX

Organizations enable positive employee experience through a multitude of factors that create a better environment in the workplace and instill positive emotions for employees. These factors of EX center on inspiring, empowering and enabling employees to feel purpose and do their jobs in the best way.

› **EX factors can be pinned down to employee productivity, well-being, and company care.** The most relevant EX factors are the ones that inspire employees with purpose in their contributions to the company’s mission, empower them to do their jobs better and enable them with the right tools, suited to their needs. To realize this, employees need an environment that makes them more productive and tools that make them feel that their needs are being addressed. Technology, especially the hardware provided at the employee workspace, can play a significant part in instilling this perception, as specific features and functionalities of user devices lend to improving their comfort, productivity, and overall workplace environment. However, to truly understand the role technology hardware can play in improving EX, we must look not only at how it impacts performance and productivity, but also the well-being of employees, and their perception of the company’s care for them and their individual needs. We will focus on these EX factors in this study.



- › **Improving productivity inspires and empowers employees.** When companies enable productivity, they empower their employees with progress and autonomy and enable them to conduct their work tasks with better speed and quality. This not only improves their performance but also their motivation and belief that they are contributing to the core mission of the organization.
- › **Employee well-being builds better work performance and sustained workforce.** Improving the performance on work tasks goes beyond making employees faster and better at their jobs; it requires them to be comfortable and efficient in their workplace environments. In this sense, organizations should relentlessly focus on the health and well-being of employees to enable better focus on work tasks and drive their long-term sustainability in the company. Regulatory bodies, especially in developed markets, like US and the UK, have policies in place that ensure companies keep to minimum standards of workplace health, which has also influenced the focus on well-being in these markets.
- › **Considering the needs of employees instills a positive sense of care and company perception.** Listening to and addressing the issues that employees face at the workplace, whether it is in the tools that they need to do their jobs better or in improving the workplace environment that impacts their health and well-being, makes employees believe that their needs are cared for and their purpose and role in the company is important. When employers recognize and act on these needs, their employees believe that their company cares about them, beyond their immediate function or work tasks, building a positive company perception in the long-run.

Building the right workplace environment by providing the right tools and hardware at the employee workspace will better productivity and cater to the employees' well-being and their perception of the company's care for them, thereby playing an important role in improving EX (see Figure 3).

“In places like the UK, ergonomics is more prevalent, especially with regulations coming into place. It is mandatory that you get your office to do a workplace assessment. So you get people much more interested/investing in the right ergonomics.”

Osteopath, based in Singapore with experience in the UK healthcare space



Figure 3

Factors That Impact EX



Base: 450 professionals across China, the UK, and the US
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, June 2019

Role Of Monitors In Improving EX

In considering how to improve productivity, well-being, and sense of care of employees, ultimately for improving EX, surveyed employers and employees recognize that designing the right workspace is key. This requires organizations to provide employees with workspace elements that suit their specific needs. Monitors have a significant role in creating an ideal workspace, especially because of specific features of ergonomics, front of screen performance (constituting of the color, resolution, and light emissions of the monitor screen), and connectivity that they entail. Such specific features can impact employee experience — productivity, well-being, and sense of care — in a multitude of ways:

ERGONOMICS OF THE MONITOR

- › **Ergonomics improves EX by improving productivity and well-being.** Ergonomics is the ability to adjust the height, angle, and space of various workplace elements to allow users or employees to create an environment that suits their specific needs. Four in five employers believe that investing in ergonomic hardware would have a high or critical impact on improving EX. External specialists further validate this: 80% of office-planning professionals also cite ergonomically friendly workspaces as having a positive impact on the workplace. In fact, employers see a close correlation between ergonomics and productivity, as 84% believe ergonomic workspaces will improve the productivity of their employees; 61% of employees agree. Seventy-five percent of employees also believe ergonomic workspaces will improve their health and well-being, further enabling a positive experience at the company.
- › **Monitors are the most important feature in building the right workspace.** Ninety-six percent of employees believe that the adjustability of monitors is the most important feature in building an ergonomically friendly workspace, over other factors like customized chairs and height-adjustable desks. Employees see it from the lens of their productivity: 92% believe ergonomically optimized monitors are highly or critically important in specifically improving their productivity (see Figure 4). Health professionals support this from the purview of health and well-being: 93% of healthcare professionals say that height-adjustable screens with pivot, swivel, and tilt functions are a critical enabler in building the right ergonomic workspace as they bring better posture and comfort to employees. This is primarily because of the customization that ergonomics offers to users, as the height of the monitor can be adjusted up or down, depending on the height of the chair, desk and other workspace elements. Furthermore, the tilt, swivel and pivot functions allow employees to set the monitor in a manner that suits their posture for long-periods of time at the workplace.
- › **Lack of ergonomics is not only detrimental to employee health, but also negatively impacts perception of the company.** Sixty-one percent of health professionals attested that their office-going patients come to them with issues of ‘chronic back pain’, a likely result of poor ergonomic workspaces. The negative effects of not investing in ergonomic workspaces also tie back to perceptions of a bad employee experience. For example, 74% of employees agree that not having an ergonomically friendly workspaces creates the ‘impression that the company doesn’t care about them’.

“Monitors are just one work tool that is often poorly positioned for a person resulting in neck/back pain and vision problems. If a job is monitor-intensive . . . good ergonomic design of monitor placement is really important.”

*Professor Alan Hedge,
Cornell University*



“In ergonomics, everything has to come in balance- the right distance, the right chair, the right height of the monitor. Adjustable monitors allow people to create their workplace in a way that suits them. ”

*Osteopath based in
Singapore with experience in
the UK healthcare space*



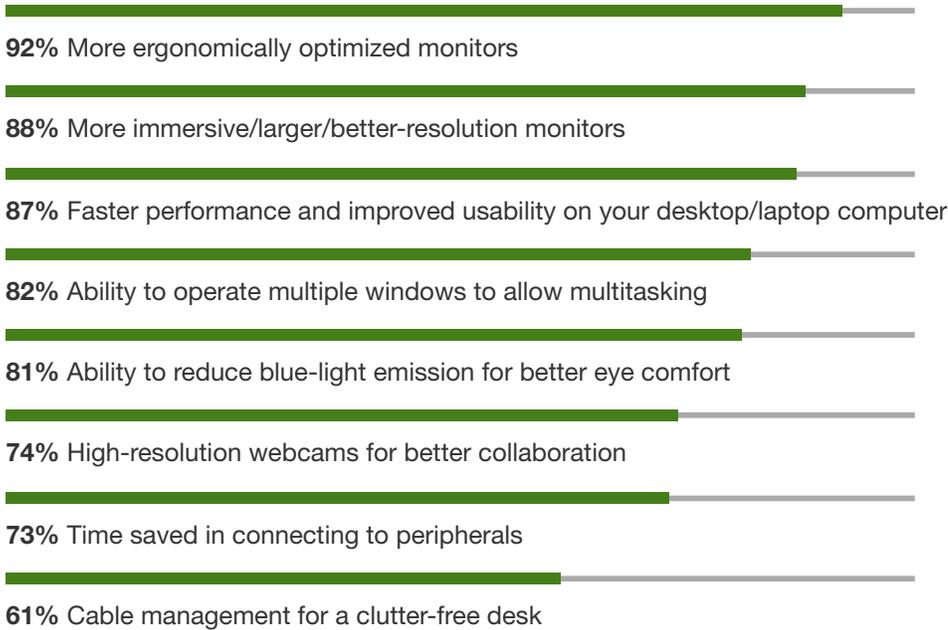
“Patients present themselves with symptoms of dry eyes, which include transient blurring of vision, eye discomfort, and intermittent redness. These symptoms are brought about or aggravated with long hours of computer monitor usage.”

*Ophthalmologist from a
leading hospital in Singapore*



Figure 4

“How important are the following factors of your hardware and devices in improving your productivity?”



Base: 150 professionals across China, the UK, and the US

Note: Not all responses are shown, showing percentage of employees considering the above features ‘critical’ or ‘highly important’

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, June 2019

FRONT OF SCREEN EXPERIENCE

- › **The front of screen experience of monitors impacts productivity.** Size and resolution, color accuracy, and reduction in blue-light emission from monitors are important features to consider in improving the productivity of the workforce. With this in mind, 67% of employers consider wide color coverage, accuracy, and calibration to be high priorities in their consideration of monitor investments. Eighty-eight percent of employees believe better resolution and more immersive monitors improve productivity, while 81% believe reduced blue-light emission enables this further. This is further highlighted in the 2018 Dell commissioned study that asked executives about the benefits of high contrast and high resolution monitors. A majority of the respondents here found that high resolution monitors reduce eye strain (91%) and the ability to view sharp images provides the high level of detail required to work better (79%).⁴
- › **Healthcare professionals recognize the importance of front of screen experience on well-being.** Sixty-eight percent of healthcare professionals validate that providing customizable color and resolution of monitors that are easy on the eyes would have a high or critical impact on the overall workplace, specifically in creating a positive well-being for employees. Sixty-six percent of employees think that reducing blue-light emissions from monitors for better eye comfort would have the same effect; employers agree that reducing blue-light emissions improves well-being (67%), especially in markets like the UK (70%) and worldwide commercial (72%) and enterprise companies (78%).

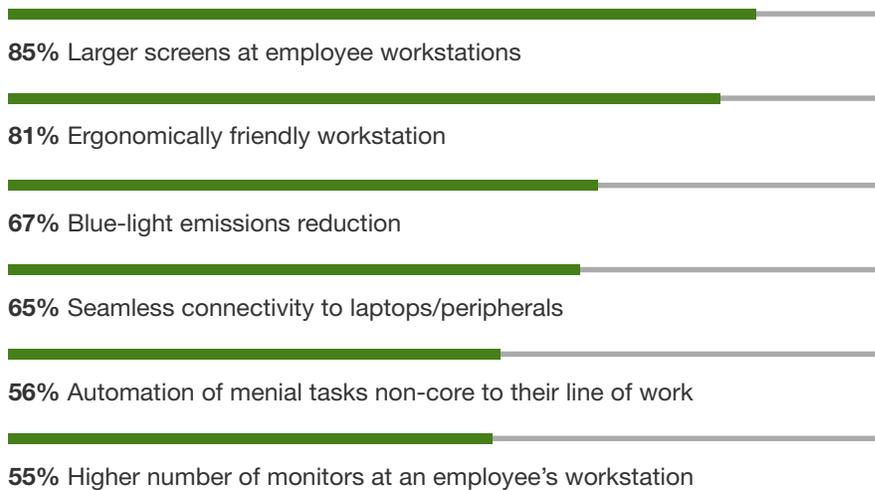
“Screen the workplace on at least an annual basis to ensure that they are continually optimizing the workplace and work tools for maximum employee health and productivity.”

*Professor Alan Hedge,
Cornell University*



Figure 5

“To what extent, would the following factors positively impact the health and well-being of employees at the workplace?”



Base: 150 professionals across China, the UK, and the US

Note: Not all responses are shown, showing percentage of employers selecting 'high' or 'critical impact'

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, June 2019

- › **Several health issues are commonly related to suboptimal front of screen experience.** Fifty-three percent of healthcare experts see issues of eye strain and blurring eyesight from monitor use to also be a significant issue that comes up among patients. Headaches (69%) and itchy/dry eyes (51%) are also among the common symptoms that arise from the lack of right devices at the workplace.

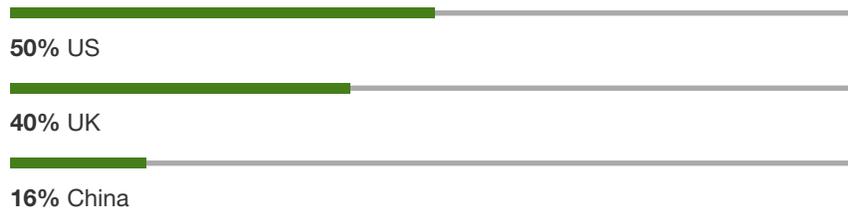
MONITOR CONNECTIVITY

- › **The connectivity of monitors improves productivity and is an important consideration in monitor investments.** Good connectivity of monitors (e.g. USB-C ports) saves time in connecting to peripherals and helps productivity, according to 73% of the employees surveyed.
- › **Connectivity features are an important consideration for monitor investment.** Sixty-five percent of employers consider seamless connectivity to peripherals and cable management or fewer wires (51%) as important considerations in their monitor investment decisions.
- › **Reducing clutter contributes to increasing employee productivity.** Sixty-nine percent of employers consider improving productivity with better space utilization and reducing clutter a high or critical priority for improving EX. This is especially the case in the US (68%) and in worldwide commercial (80%) and enterprise companies (82%), where reducing clutter was an important issue to consider. Given the importance that monitors hold in the workspace, the connectivity features of the monitor are an important consideration to address for productivity and EX.

› **Lack of connectivity features impacts employee work productivity.** Forty percent of employees say there is too much clutter around their desks with cables distracting them from their work and productivity. Similarly, almost half realize that it is not easy to plug or unplug seamlessly while moving through meetings with their current monitor setups, implying that working with current limitations in connectivity features incurs unproductive time usage at the workplace. According to a Princeton study, the cognitive effect of too much clutter also leads to too much chaos for your brain to focus and process information, thereby impacting productivity.⁵

COUNTRY SNAPSHOT: KEY INSIGHTS

Figure 6: State Of Workplaces More Advanced In US And UK Than China
Percentage of employees who consider their workplace state-of-the-art:



Base: 150 professionals across China, the UK, and the US
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, June 2019

US	UK	China
<ul style="list-style-type: none"> US organizations have a good synthesis on the importance of EX across their departments. Overall 64% of IT departments in this market consider employee experience and well-being an important priority. US organizations should invest carefully in the features that build EX, as 96% of their employees believe that positive EX will improve their ability to work in a more effective manner.  <ul style="list-style-type: none"> Seventy-two percent consider the long-term partnership with vendors providing monitors as an important consideration for their monitor investment, but also feel specific monitor features, like the ergonomics of the monitor (80%) and seamless connectivity to peripherals (74%), are equally important. 	<ul style="list-style-type: none"> Sixty-six percent of UK organizations believe their IT teams consider the well-being of employees when considering their priorities for the year. EX is an important factor that enables employee loyalty. While 88% of employees in the UK believe better EX will improve their ability to be more productive, 68% also believe it will increase their loyalty toward the company. Given the connection hardware investment has on EX, it is important for UK organizations to listen to the needs of their employees and invest in the features that suit their preferences. In the case of monitors, UK employees especially consider the ergonomics (98%) and the resolution (96%) to help their EX. 	<ul style="list-style-type: none"> Only 46% of Chinese companies consider well-being and EX in the priorities of their IT departments. The subpar state of workspaces in China needs to be addressed to enable better EX and well-being. Only 16% of employees in China believe their office space is state-of-the-art. Investing in the right ergonomic hardware and equipment, as requested by 64% of employees in this market, not only will make them more productive in their work but will also be important to build a positive EX and perception of the workplace in China. From a healthcare professional standpoint, 81% believe that lack of concern on employee workspace comfort is impacting the health and well-being of office-going professionals. 

Key Recommendations

For organizations to improve employee experience, they need to consider aspects in their workplace that improve productivity and well-being of employees and make employees feel that their needs are being cared for. The workspace of employees, especially when considering the ergonomics of the space, has become an important characteristic of improving EX; monitors are cited as the most important aspect on which organizations should concentrate. The ergonomics of the monitor, as well as its connectivity features and front of screen experience, hold significant weight in improving the productivity and well-being of employees and are key feature considerations of managers investing in monitors today.

Forrester's in-depth surveys of employers, employees, and healthcare professionals and office planners about the role of monitors in employee experience yielded several important recommendations:

EX AND MONITORS



Have a 360-view of CX and the impact EX can make. For customer experience to be sustained and effective in the long-term, organizations need to build a holistic connection with their employees. Understanding your employees — their needs in not only doing their job better but in their well-being and their perception of the company — is important. When IT and business leaders make decisions on the technology and hardware investments for their employees, thinking through how those investments impact the employees' productivity, their well-being, and the perception it creates that their needs are listened to will go a long way in building a better EX.



Monitor features are important considerations to tie back to EX. This study indicates that monitors can improve EX by contributing to key EX factors of improving productivity, well-being and a sense of company care. Therefore, when companies choose their monitor investments, employers should look into specific features such as the adjustability of the monitor, screen color and resolution, and the convenience it provides to customers in connecting to peripherals.



COUNTRY DIFFERENTIATORS

The mature markets of the US and UK are working toward bettering the well-being and productivity of their employees. Additionally, the close association employees in these markets make between EX and productivity and their loyalty to the company is all the more reason for organizations to do more about it. Investing in the right monitors that their employees resonate with is important for companies to improve and sustain positive employee experience.



Organizations in China need to focus on improving the state of the workplace for a real impact on EX. Companies here need to do more in investing in the right ergonomic hardware and improve their employees' perception on the state of ergonomics at their workplace. A mindset shift is needed, to prioritize EX as a whole to improve CX and productivity, as they desire. In this vein, thinking beyond productivity and considering well-being and company perception more seriously would enable these organizations to realize and sustain the benefits of improving EX.

SEGMENT SNAPSHOT



Medium enterprises need more awareness on the value of an EX focus. These enterprises recognize the impact a positive EX will have on their ability to serve customers better, marginally better than their larger enterprise counterparts. However, in light of a bad EX, employees in smaller firms are also more sensitive in their perceptions of the company and the company's consideration of their needs. Focusing on providing the right tools, environments and experience to help employees do their jobs more productively is what is needed to build better perceptions and thereby increase company loyalty from employees in such firms. Thinking not only about ergonomics, but about specific features of connectivity, front of screen experience in monitor investments, would build a more effective approach to improving EX in such companies.



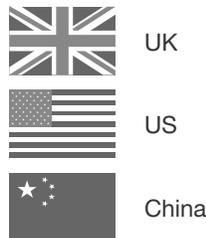
Larger companies could reach further in their roadmap for a positive EX. While commercial and enterprise companies recognize the need to consider specific monitor features to better well-being and productivity marginally better than their medium enterprise counterparts, employee experience in such larger organizations has far more room for improvement. Given the scale and complexity that larger organizations have to manage, they shouldn't forget about the personal elements of listening to the needs of their employees and provide the hardware enhancements their employees specifically require.

Appendix A: Methodology

In this study, Forrester interviewed four healthcare professionals and conducted an online survey of 150 employees, 150 employers, and 150 healthcare professionals/office planners in the US, the UK, and China. Employee and employer survey participants were from medium businesses (annual revenue of USD \$50,000 to \$1 million), commercial companies (annual revenue of USD \$1 million to \$50 million) and large enterprises (annual revenue of USD \$50 million and above).

Appendix B: Demographics/Data

SURVEY COUNTRIES



ANNUAL REVENUE (in USD)

- Medium businesses – \$50,000 to \$1 million
- Commercial companies – \$1 million to \$50 million
- Enterprises – \$50 million and above

SURVEY TARGETS



SURVEY TARGETS

- **Employers:** business and technology leaders involved in IT buying decisions
- **Employees:** knowledge workers predominantly using monitors at work, working 30 hours or more per week
- **Specialization:** healthcare/office planning professionals

Base: 450 professionals across China, the UK, and the US. 150 professionals across three distinctive segments for employers, employees, and healthcare/office planning

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, June 2019

Appendix C: Endnotes

¹ Source: “Why EX? Why Now?” Forrester Research, Inc., November 27, 2018.

² Source: “Sharpen Customer Experience Focus With Employee Engagement,” Forrester Research, Inc., August 26, 2013. Note: Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

³ Source: “Extend the Customer Experience To Employee Experience,” Forrester Research, Inc., October 3, 2017.

⁴ Source: Elevate Employee Productivity By Choosing The Right Display Monitors, A Forrester Consulting Thought Leadership Paper Commissioned by Dell, April 2018;

⁵ Source: Unclutterer.com; ‘Scientists find physical clutter negatively affects your ability to focus, process information’

Project Director:

Sruti Pegatraju, Consultant
Sri Prakash Gupta, Consultant

Contributing Research:

Forrester's Customer Experience
Research Team

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