FORRESTER®

The Road To Digital Experience Success

A Modern Approach For Mid-Size Firms

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Improve Employee Experience And Digital Operations Concurrently

The world of work is not changing. It has already changed. Firms that have not boarded the ship need to get on now or risk being left at shore. Mid-size firms particularly should not ignore this trend. As emerging technologies stretch the job market and take over mundane tasks, mid-size firms will increasingly struggle to attract and maintain the best talent. These organizations must accelerate their internal digital experience improvement efforts now before it is too late.

In January 2020, Dell commissioned Forrester Consulting to evaluate the unique challenges faced by mid-size firms in their efforts to improve employee experience (EX). To do so, we surveyed 995 business and information technology (IT) leaders involved in decision making for procurement of devices at their mid-size (100 to 999 employees) organizations.

Key Findings

Mid-size firms adopt their own flavors of cloud to increase agility and improve EX.

Security and IT remain operationally focused — to the detriment of employee experience and productivity.

Modern organizations turn to modern management — including as-a-service models — to improve both EX and internal operations.

The Business Impact Of Technology Experience

We live in a digital world — and digital has changed our products, insights, business operations, and, perhaps more importantly, employees. Employees are and always will be the face of the business, which is why firms must ensure employees have all the tools needed to succeed.

In fact, over the next 12 months, business and IT decision makers will focus on improving employee productivity by providing a variety of devices (67%) and improving the technology experiences employees face (67%).
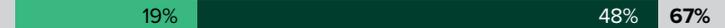
Mid-size firm decision makers know that they need to adopt more as-a-service processes (64%) and virtualize workloads (63%) to succeed.

Top technology priorities over the next 12 months

● Critical priority   ● High priority

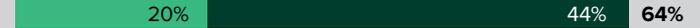Improve employee productivity by providing a variety of devices to work from
| 19% | 48% | **67%** |

Improve the technology experience of employees
| 20% | 47% | **67%** |

Increase the budget for IT
| 23% | 42% | **65%** |

Adopt more as-a-service technologies and processes
| 20% | 44% | **64%** |

Reduce technology expenses
| 19% | 44% | **63%** |

Virtualize more workloads either on-prem or in the cloud
| 16% | 47% | **63%** |

Implement Zero Trust security architecture
| 20% | 42% | **62%** |
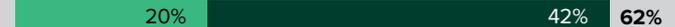
Increase higher collaboration between IT and LOB to make better tech decisions
| 16% | 45% | **61%** |

Base: 995 business and IT decision makers involved in device procurement at their organizations
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, January 2020

Overview

Current State
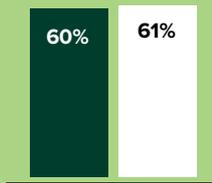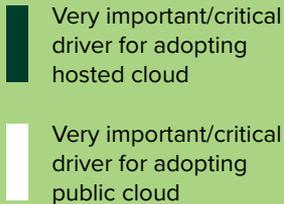
Challenges

Opportunity

Conclusion

Do Not Go To The Cloud To Save Money — Do It To Increase Agility

Cloud usage over the next three years is expected to rise by 67%. Mid-size firms continue to invest in both hosted and public cloud to expand agility. Being agile is now a companywide ambition, as it means scaling applications up and down efficiently and responding quickly and securely to disasters and disruptions. Mid-size firms also turn to cloud to improve business continuity, enable flexibility in their IT organizations, and improve EX by enabling employees to work from anywhere.
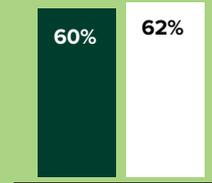
A core driver of cloud adoption — both hosted and public — is employee enablement and experience.

"How important were/are the following drivers in your decision to adopt hosted cloud? Public cloud?"

■ Very important/critical driver for adopting hosted cloud

□ Very important/critical driver for adopting public cloud
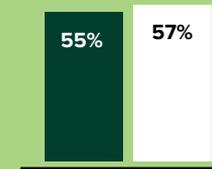
60% **61%** — Improved disaster recovery and business continuity

60% **62%** — Improved employee experience by providing more flexibility to work from anywhere
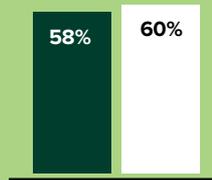
58% **60%** — Improved IT infrastructure manageability and flexibility

55% **57%** — Ability to use at peak capacity for times of high usage, such as the holiday season

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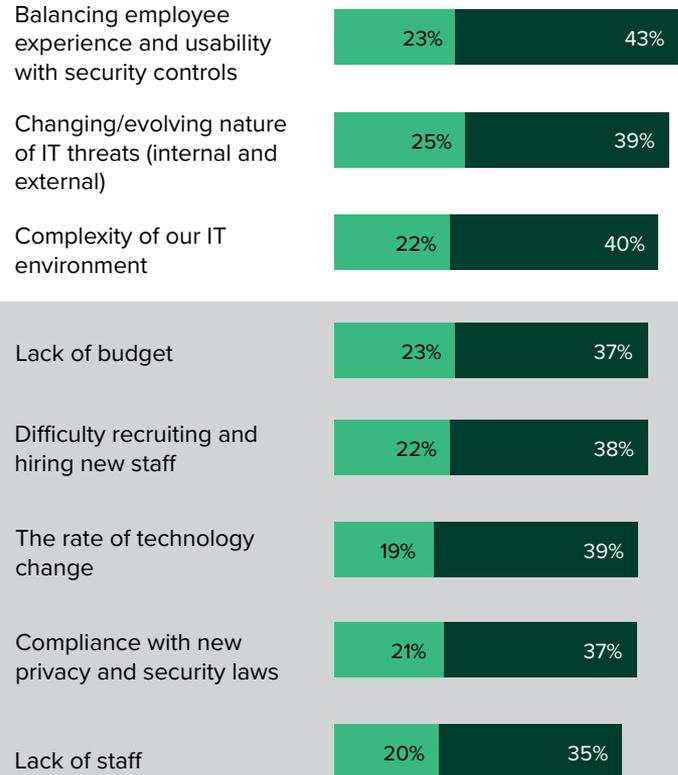## Security Can Be An Employee Experience Threat

While many firms have invested significantly in technologies to support digital experience initiatives, business and IT decision makers cite balancing EX with security (66%), the changing nature of IT threats (64%), and complexity of IT environments (62%) as their top IT challenges.

Security's priorities often clash with those of the business and other IT functions. In remediating threats, security can become its own EX threat by shutting down systems vital to employee productivity and experience.

Business and technology leaders — including those in security — must work together to anchor their strategies in improved EX. Failing to align around the employee will result in a never-ending game of tug-of-war between security and the rest of the organization.

Top IT-related challenges for mid-size firms

● Major challenge   ● Challenge

	Major challenge	Challenge
Balancing employee experience and usability with security controls	23%	43%
Changing/evolving nature of IT threats (internal and external)	25%	39%
Complexity of our IT environment	22%	40%
Lack of budget	23%	37%
Difficulty recruiting and hiring new staff	22%	38%
The rate of technology change	19%	39%
Compliance with new privacy and security laws	21%	37%
Lack of staff	20%	35%

IT Has A Seat At The Table, But Their Heads Remain Down

IT and business objectives are increasingly becoming intertwined, which means that technology organizations must become a trusted partner rather than a utility.

When we asked decision makers at mid-size firms what their biggest operations challenges are, they ranked PC configuration and device management at the top of the list. Traditional device procurement models mire enterprises in slow device-acquisition processes that result in an outdated technology experience for employees.[1] IT leaders must take a more strategic, EX-minded approach to device management to both improve EX and increase their own capacity for focusing on more complex challenges.

"Which of the following ops activities are the biggest challenge for your organization today?" (Showing top five)
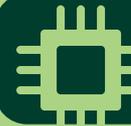
PC configuration and deployment

Device management

Application distribution

Software development

Volume of help desk requests

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You Are Not Giving Your Employees The Autonomy They Deserve

Employees desperately want to do well at their jobs, but it is your job to create a culture and environment that inspires — not deters — innovation and productivity.

When reflecting on EX and the challenges faced by employees, leaders listed a lack of flexibility in deciding where to work, a physical workplace that is not enjoyable, and a lack of autonomy in being able to share ideas to drive innovation. The gears of culture, structure, process, and technology must turn together toward a common employee-oriented goal to address these challenges. If employees are not given the right tools and ecosystem to function autonomously, they will continue to have poor experiences that hinder engagement and productivity.

"From your perspective, what are the biggest challenges with employee experience today at your company?" (Select all that apply)

27%
Employees don't have any flexibility of deciding where to work

26%
The physical workplace is not enjoyable

22%
Employees don't feel free to express their ideas, innovate, or take risks

20%
Executives do not listen to employee concerns

19%
Our attrition rate is growing

18%
My organization doesn't provide adequate support for remote workers or those on the move

16%
Employees don't feel valued by their managers and/or company

15%
We don't have the right technology to attract new hires

98% of respondents experienced at least *one* challenge.

Modern IT Organizations Turn To Modern Management

To overcome operations challenges, business and IT decision makers say they will adopt digital workspaces to unify apps and content for employees, as well as modernize PC management. This rings even more true for "modern" IT organizations that have already transitioned from utility to strategic partner.

Modernizing PC lifecycle management (PCLM) enables organizations to quickly refresh broken or old devices with the newest models. For mid-size businesses — where work is constantly evolving — this is a much-required need. Adopting PC-as-a-service (PCaaS) also helps companies quickly swap out devices and ensure that an employee's personal settings, profiles, and apps all transfer as well, meaning employees can get to work immediately upon receiving their new devices.[2]

"What are your firm's plans to adopt the following technology and/or operational initiatives to improve IT ops?"
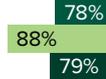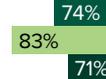(Showing top 10 only; "Critical" and "High priority" combined)
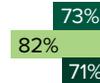
Traditional   Modern   Business

Digital workspaces to unify applications and content in a single place for employees
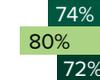- 78%
- 88%
- 79%

Modern management of PCs to simplify PC management
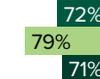- 74%
- 83%
- 71%

Enterprise service management (i.e., unifying IT services with broader enterprise services, such as HR)
- 73%
- 82%
- 71%

Predictive monitoring of employee device breakdowns
- 74%
- 80%
- 72%

AIOps to produce intelligent automation of common IT ops workflows
- 72%
- 79%
- 71%

Employee persona development to better enable employees with tools for their jobs
- 72%
- 77%
- 72%

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Digital Workspaces Encourage Focus And Productivity

Digital workspaces are gaining increased amounts of attention from organizations looking to centralize their apps while keeping EX top of mind.

Applications play a foundational role in ensuring a productive technology experience, but delivering an increasingly diverse mix of apps anywhere on any device is difficult. This is exactly why digital workspaces are gaining unprecedented attention as they can enable employees with flexible app access from any device and simplify device management for IT. Modern application delivery, however, is impossible without a modern technology and architecture backbone. It will take time to spread new practices, new working behaviors, and cultural change while modernizing your architectures and infrastructure, so make the transition to digital workspaces and modern application delivery a journey — not a destination.[3]

Top 5 reasons mid-size firms are investing in digital workplaces

Simplifying management of apps

Enabling employees with flexible app access from any device

Simplifying management of devices

Reducing context switching by not forcing employees to hop between apps

Enabling closer adherence to regulations

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Improve Employee — And Your Own — Experiences

Improving technology experiences has obvious benefits to the business and employees. This includes increased employee productivity and autonomy. Modern IT organizations also see the long-term benefits of increased employee tenure and curbside appeal with new hires.

A modern management approach can also help you tackle the IT management, cloud, and security challenges outlined previously. For example, deploying user environment manager (UEM) agents to all employee devices establishes a baseline of security using conditional access. This also sets the stage for ops teams to begin experimenting with cloud-based management.[4] On the device deployment and management front, approaches like PCaaS provide the flexibility to more easily scale up and down as needed (e.g., supporting a higher number of employees after a hiring sprint).[5]

"What do you believe are the biggest benefits to improving tech experience?"

Traditional   Modern   Business

More productivity
- 57%
- 58%
- 61%

Employees will have all the security access required
- 49%
- 67%
- 50%

The apps my company provides are valuable and easy to use
- 48%
- 55%
- 48%

I can access most company-issued apps on the move, outside of the office
- 33%
- 37%
- 32%

Attract new hires
- 28%
- 40%
- 33%

Stay for longer careers
- 22%
- 33%
- 20%

Now Is IT's Moment To Shine

For years, IT has taken a back seat while other business departments drove innovation at their companies. With the rise in importance of EX, IT pros are back in the driver's seat. To be successful, they should:

Automate as much as possible. IT leaders must look to automate as many elements of PCLM as possible. That includes device deployment, application configuration, incident resolution, and device retirement.

Listen as best they can. Although all employees value autonomy in their work lives, their preferences are different. IT pros must do the hard people-focused work of identifying unique challenges, cocreating solutions with employees, and delivering a personalized experience for each employee.

Think holistically. A great technology experience requires more than just a device; it requires apps, seamless authentication, and critical peripherals like monitors. IT pros should strive to provide this entire ecosystem of technologies to best serve employees.

Project Director:

Tarun Avasthy, Senior Market Impact Consultant

Mandy Polacek, Market Impact Consultant

Contributing Research:

Forrester's Infrastructure and Operations research group

Methodology

This Opportunity Snapshot was commissioned by Dell. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of 995 business and IT leaders involved in decision making for procurement of devices at their mid-size (100 to 999 employees) organizations. The custom survey began and was completed in January 2020.

ENDNOTES

[1] Source: "Enhance Digital Employee Experience With Device-As-A-Service (DaaS)," Forrester Research, January 23, 2020.

[2] Ibid.

[3] Source: "Assess And Enhance Your Modern Application Delivery Journey," Forrester Research, October 16, 2019.

[4] Source: "Embrace Modern Management To Improve Employee Experience," Forrester Research, September 9, 2019.

[5] Ibid.

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

Methodology

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REGION

North America: 27%

Western Europe: 13%

Australia/New Zealand: 12%

Japan: 12%

Germany: 12%

APAC: 12%

UK: 12%

EMPLOYEE SIZE

100 to 499 employees: 67%

500 to 999 employees: 33%

DECISION-MAKING AUTHORITY

I am a part of a team or committee making decisions for my entire organization's technology and IT services: 38%

I am the final decision maker for my entire organization's technology and IT services: 24%

I am the final decision maker for my department or business unit's technology and IT services: 23%

I report into the IT organization, but I make technology and services purchasing decisions on behalf of a department or business unit: 11%

I influence decisions related to my organization's technology and IT services through a formal process of business stakeholder technology feedback or needs assessment: 4%

ANNUAL REVENUE

>$5B: 1%

$1B to $5B: 7%

$500M to $999M: 21%

$400M to $499M: 18%

$300M to $399M: 21%

$200M to $299M: 16%

$100M to $199M: 7%

$1M to $99M: 9%

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