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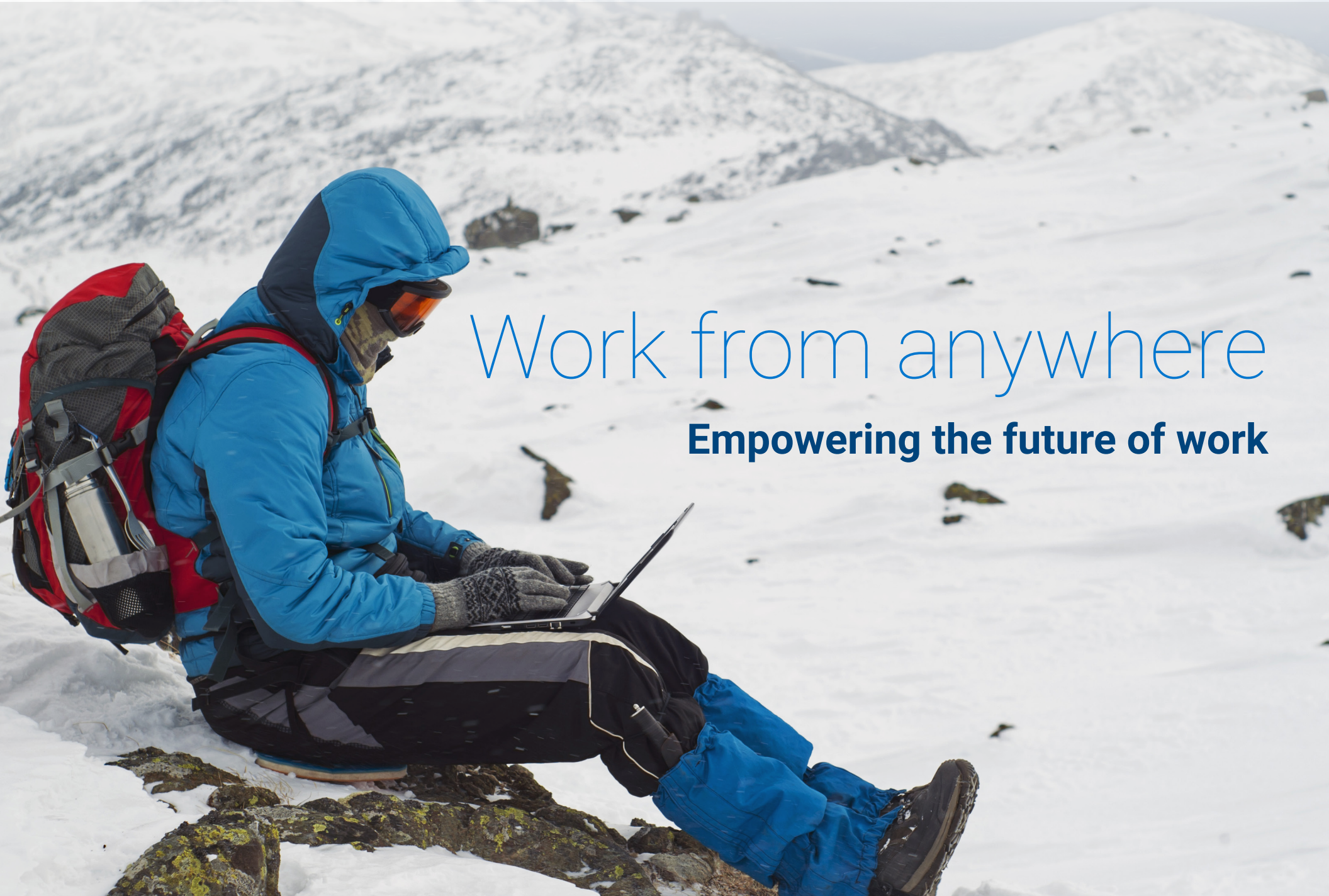


Work from anywhere

Empowering the future of work

Introduction

Almost overnight, nearly every organization around the world had to mobilize their workforce to operate remotely. It placed untold strain onto IT departments to rapidly configure and deploy devices, infrastructure and software which could support such a shift, and user expectations were high. They wanted the same fluid experience to perform their roles from anywhere.

This transition sparked organizations to embrace the "work from anywhere" mindset (also known as a "remote-first" mindset). The "work from anywhere" mindset is defined as when organizations shift their mindset to treat remote and location-based employees the same, regardless of where they work.

» This mindset offers employees the opportunity to do just what it says on the tin: seamlessly work from any location, as if they were in the traditional office environment. By adopting a "work from anywhere" mindset, there is a huge degree of flexibility, to both employees and organizations that can be gleaned; this way of working has become commonplace, and employees now consider it as standard practice, as opposed to a privilege.

Despite this rather hasty and enforced move towards a "work from anywhere" mindset, in most cases, it is resulting in highly desirable benefits for organizations. If adopted successfully, organizations can see an increase in employee wellbeing, productivity and efficiencies.

While it may seem challenging at first, the time has come for organizations to put in place permanent processes and solutions to what was once misconstrued as a temporary situation.

» By not tackling this issue, organizations risk losing their top talent to organizations embracing a "remote-first" culture that promotes remote and hybrid work as well as missing out on the talent pool available to more remote-friendly organizations.

» While all roles should embrace the "remote-first" culture to ensure the talent pool is fully tapped into, there must be flexible rules and boundaries to enable those employees to flourish.

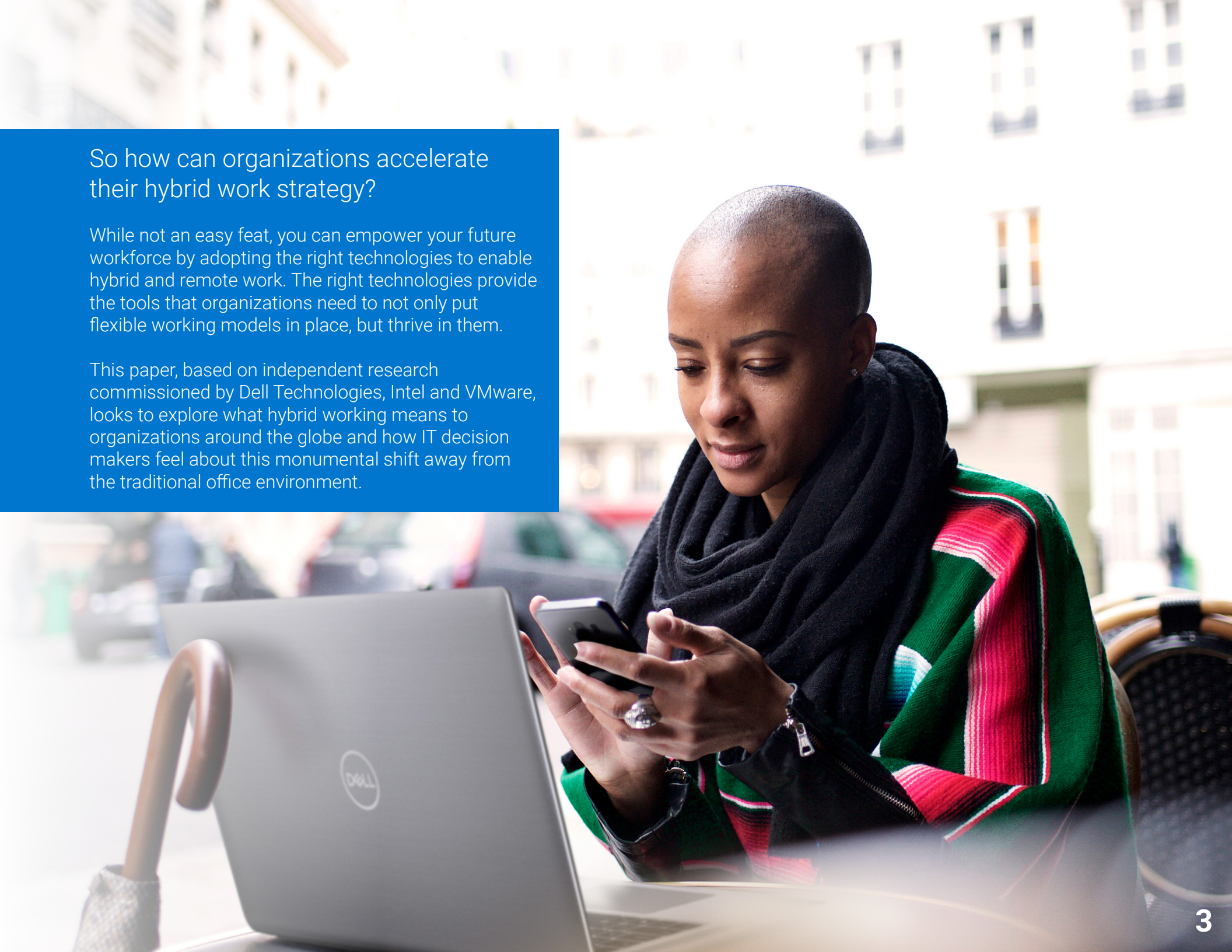
A flexible working model eliminates the geographical barriers that once stood in the way of recruitment, effectively leveling the playing field. This flexibility is a benefit to both employers and employees, with more choice over who and where the organization can hire from. Companies have a larger pool of employees to hire. Employees have a much wider pool of organizations they can work with, and far less reason to settle for a sub-standard employer, enabling a move to a rival with a "work from anywhere" culture much easier and more appealing.

This potential increase in staff turnover could be devastating for organizations. And if this wasn't a big enough driver as it is, organizations who do adopt a "work from anywhere" mentality are more likely to reap the rewards of a lower staff turnover.

So how can organizations accelerate their hybrid work strategy?

While not an easy feat, you can empower your future workforce by adopting the right technologies to enable hybrid and remote work. The right technologies provide the tools that organizations need to not only put flexible working models in place, but thrive in them.

This paper, based on independent research commissioned by Dell Technologies, Intel and VMware, looks to explore what hybrid working means to organizations around the globe and how IT decision makers feel about this monumental shift away from the traditional office environment.



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Key Findings

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21% of organizations have already implemented and are fully using a hybrid working model

52% of ITDMs (IT decision makers) currently spend half or more of their time working remotely, while 63% would like to work that way in an ideal world

38% of ITDMs worry that returning to a physical working location will leave them having less time to spend with family

50% report that keeping the organization secure and providing proactive and remote IT support (49%) are concerns when supporting a "remote-first" mindset

86% agree that all organizations should be adopting a "remote-first" mindset

96% report that their organization is looking to adopt this kind of mindset, with 14% already having done so

99% of organizations who have implemented hybrid work have invested in technology over the last 12 months

56% of organizations who have implemented hybrid work report increased employee satisfaction and wellbeing as a result of working more flexibly

Defining and adopting hybrid working

The acceleration of digital transformation and the shift to a "work from anywhere" mentality caught many organizations by surprise. Most organizations were not set up to allow remote working so widely, and over such a sustained period of time. The sudden shift caused a massive culture change in terms of where, when and how organizations are working and how their future workforce will be shaped.

The way many organizations are approaching this shift, often referred to as "hybrid working", is different from one another and is tailored to their organization. It means something different to surveyed IT decision makers around the world.

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How ITDMs define "hybrid working" - in their own words

The employees of the future will be constantly changing locations, changing states, changing patterns, behaviours and working styles.

ITDM in the financial services and insurance sector

Hybrid working will require a major cultural change, but as we saw during the pandemic, it can be successful if the correct procedures are put in place.

ITDM in the primary/ secondary education sector

Hybrid work means correcting the balance between one extreme of the spectrum - being fully co-located - and the other extreme - being fully distributed. Effective hybrid working means becoming intentional about how, where and when to collaborate across multiple modes of working.

ITDM in the IT and technology sector

Remote or home working/ learning was essential during the COVID pandemic. But it wasn't suitable for everyone.

Hybrid work allows remote workers/learners to remain part of the organization culture, being connected and having a sense of purpose.

ITDM in the higher education sector

Figure 1: In your own words, how would you define "hybrid working"?/ In your own words, how would you define "hybrid working" / "hybrid learning"? [2,000]

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Agreement on what definition best fits their understanding of hybrid working is also split among respondents, further cementing this idea that IT decision makers aren't aligned on what hybrid working means to them.

Which definition most closely aligns with IT decision makers' understanding of the term hybrid working?

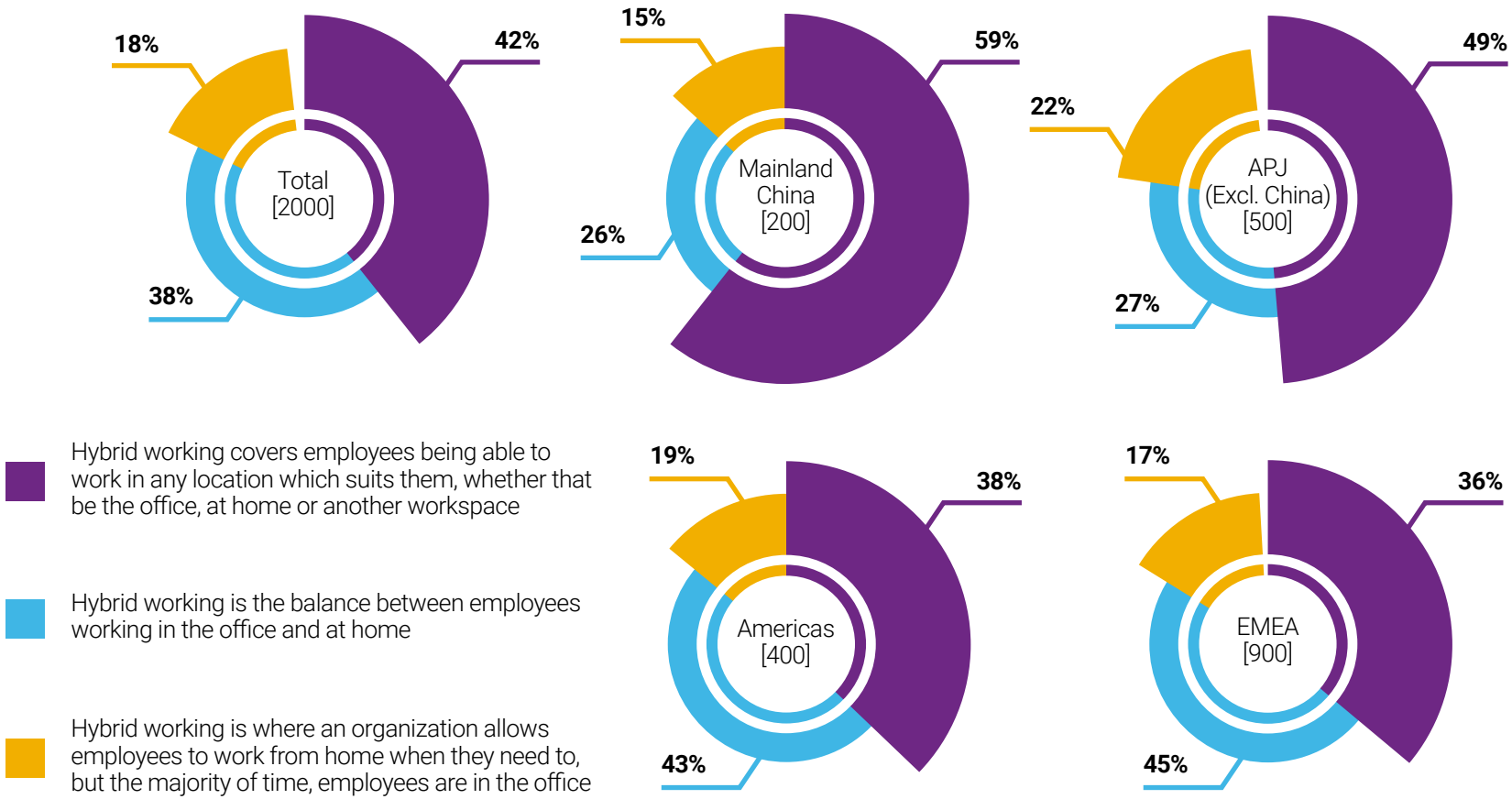

Figure 2: Which of the following definitions do you think most closely aligns with your understanding of the term hybrid working? [Base in chart], split by region (Q2)

This same disparity is noted across the different industries and sizes of organizations surveyed. If hybrid working has such a breadth of meaning for all involved, it is crucial that organizations are prepared to meet this wide range of expectations, or risk losing out to companies that will.

It's also apparent that their organizations are adapting to their own definition in order to satisfy changing business and employee needs and expectation.

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Organizations' adoption of a hybrid working model

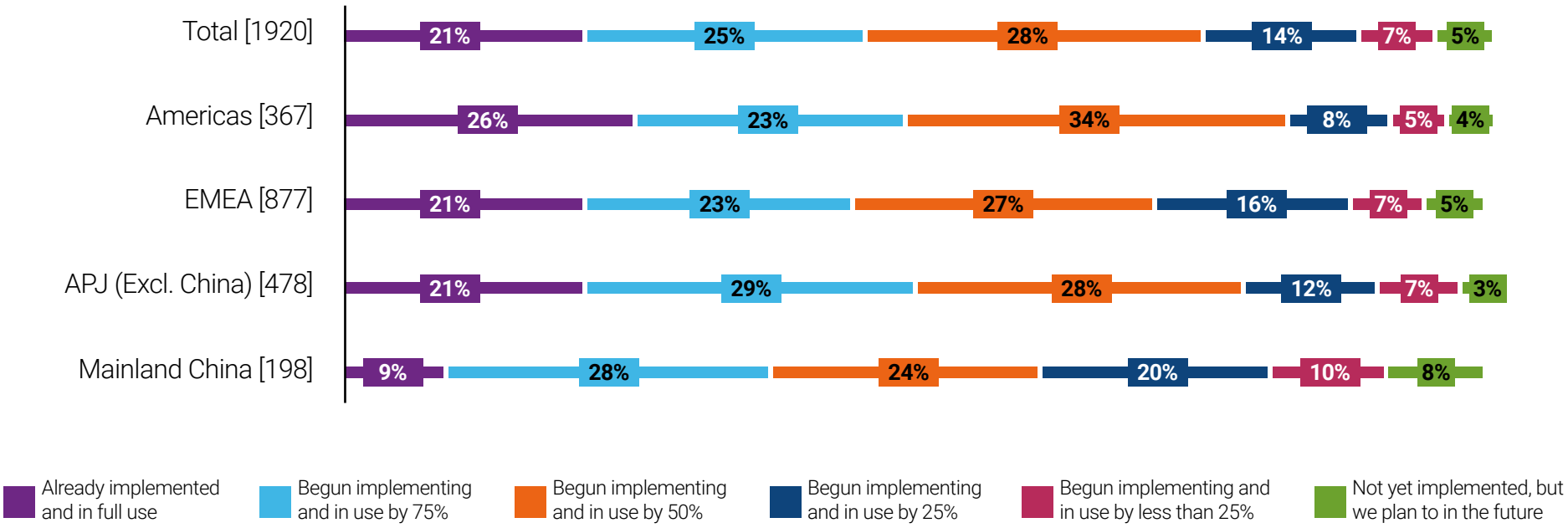

Figure 3: As it stands today, to what extent has your organization adopted or plans to adopt a hybrid working model?
[Base in chart], organizations who have at least some of their employees working both in the office and remotely, split by region (Q4)

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Respondents from governmental organizations (29%), as well as those in higher education (24%) and financial services and insurance (23%) are the most likely to have already implemented the hybrid working model today. Larger organizations (those with 3,000 or more employees globally) are also more likely to have already implemented this model versus those from smaller organizations.

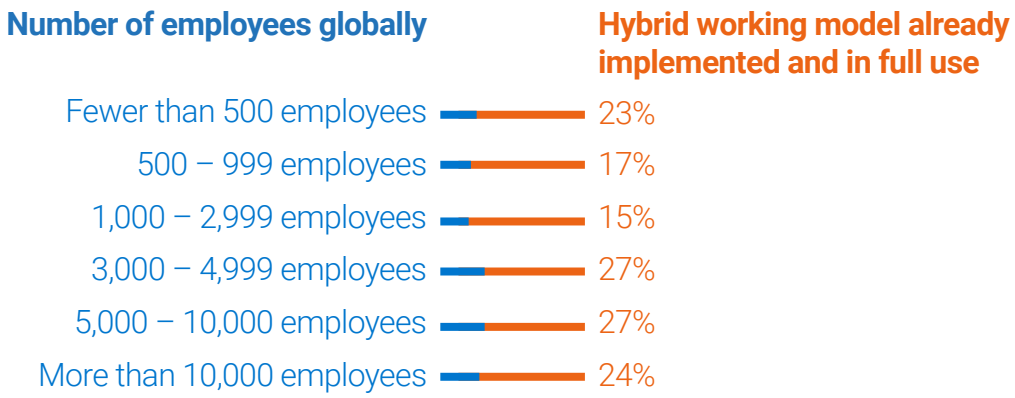

Figure 4: Percentage of respondents' organizations who have already implemented a hybrid working model and are using it in full today [1,920], organizations who have at least some of their employees working both in the office and remotely, split by number of employees globally (Q4)

Those who classify hybrid working as the balance between employees working in the office and at home are more likely to have already implemented this model (25%) versus those who report the other two definitions.

Organizations who have already implemented a hybrid working model and are using it in full: which definition most closely aligns with your understanding of the term hybrid working?

	Hybrid working is the balance between employees working in the office and at home	*Hybrid working covers employees being able to work in any location which suits them, whether that be the office, at home or another workspace*	*Hybrid working is where an organization allows employees to work from home when they need to, but the majority of the time, employees are in the office*
Hybrid working model already implemented and in full use	25%	19%	16%

Figure 5: Percentage of respondents' organizations who have already implemented a hybrid working model and are using it in full today [1,920], organizations who have at least some of their employees working both in the office and remotely, split by the definition which most closely aligns with their understanding of hybrid working (Q4)

Those who define hybrid working as "employees working at home only when they need to" are further behind the adoption of a hybrid model. However, for those who feel hybrid working should be more flexible (as seen above in figure 5), it takes longer to implement the right technology.

Although organizations' approaches and progress may differ, they cite common challenges in their transition to hybrid work.

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Which areas do organizations need help with in order to transition to a hybrid working environment?

Figure 6: Which of the following areas, if any, does/do you think your organization needs help with, in order to transition to a hybrid working environment? [2,000] (Q14)

Organizations with either fewer than 500 employees or more than 10,000 employees globally are less likely to report that they require help transitioning to a hybrid working environment. It's likely that for the smaller organizations, there is less to do in order to make the transition and they have greater ability to act in an agile and flexible nature. Bigger organizations are perhaps more likely to have the funds behind them in order to make these changes happen.

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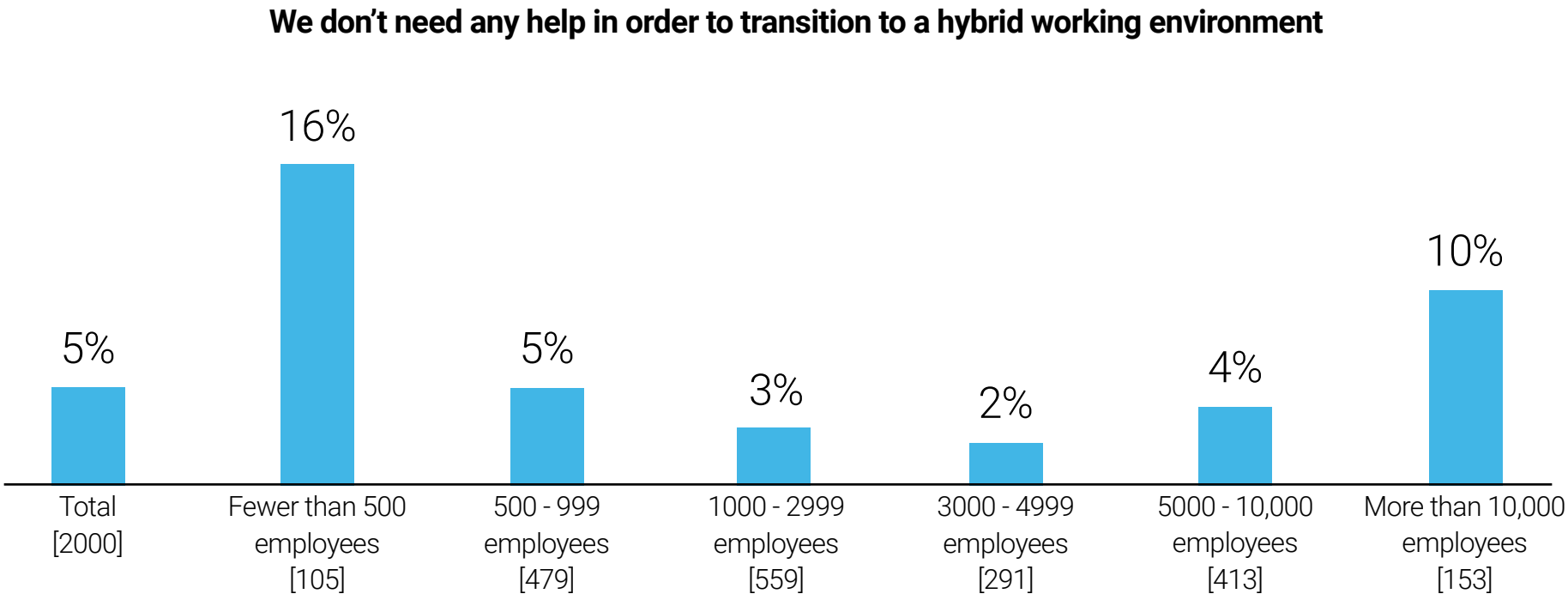

Figure 7: Percentage of respondents who report their organization doesn't need any help in order to transitions to a hybrid working environment [Base sizes in chart], split by the number of employees organizations have globally (Q14)

Even though these organizations are less likely to believe they need help, the areas where they do require support are similar to the global issues highlighted in figure 6. These struggles are universal and must be tackled now in order for a successful hybrid working environment to be implemented. The "work from anywhere" mentality is here to stay and investing time and effort into it now will pay dividends in an organization's future workforce.

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Hybrid working - the personal angle

Like many across the organization, most surveyed IT decision makers share the desire to work flexibly. The shift to a "remote-first" mindset is becoming more obvious.

Which areas do organizations need help with, in order to transition to a hybrid working environment?

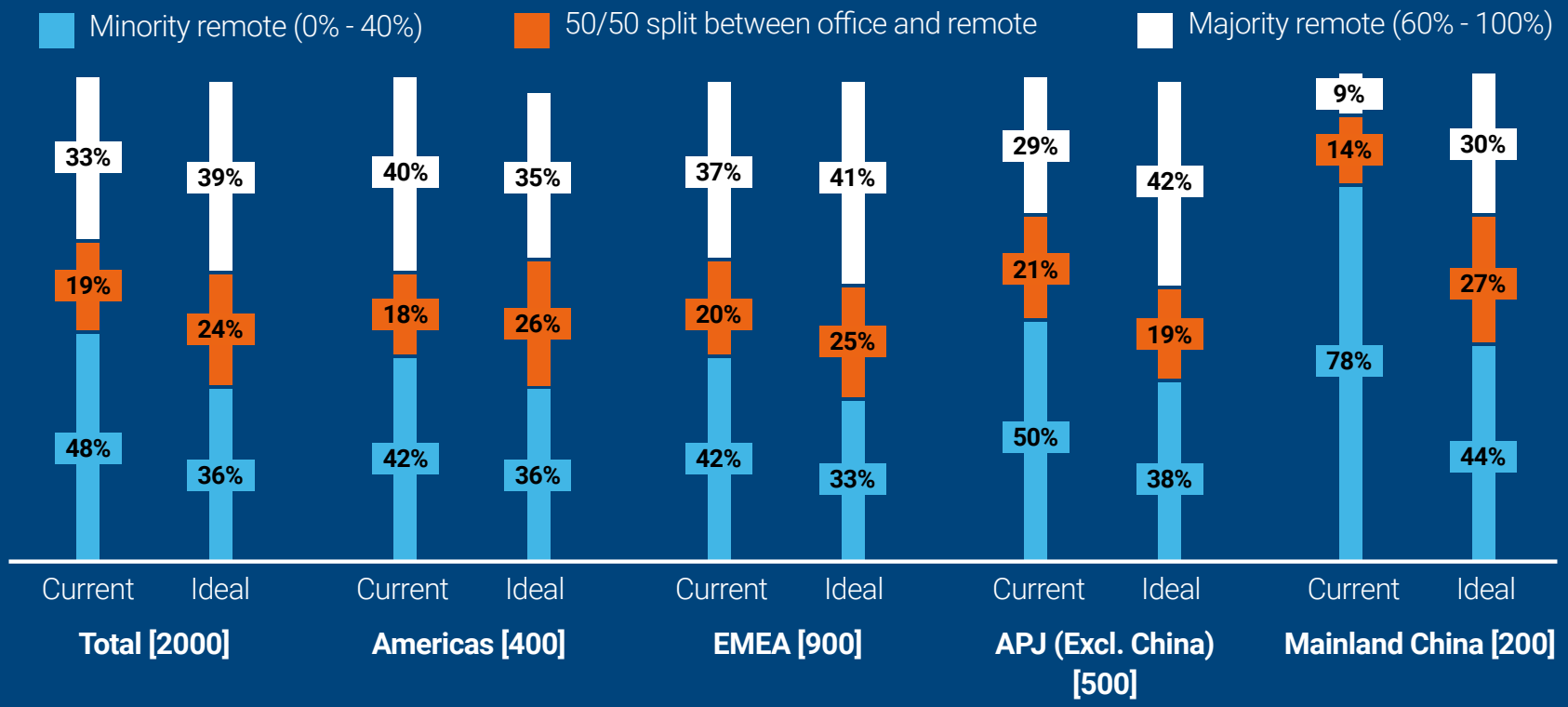

Figure 8: How do you currently split your time between the office and remote working and what would this split look like in an ideal world? [Base sizes in chart], split by region (Q20)

The difference between current and ideal expectations when it comes to working remotely are much more pronounced for certain respondent groups. Over three quarters of those from Mainland China currently spend the minority of their time working remotely, whereas in an ideal world, they would spend 50% or more of their time working remotely. Given those from Mainland China are the least likely to have implemented a hybrid working model to date, it seems the expectations of ITDMs from this region differ from those of the organizations where they work. The same story is prevalent for respondents from smaller organizations around the globe (fewer than 500 employees globally), as over two thirds (68%) currently spend the minority of their time working remotely. This proportion drops to 38% when thinking about their ideal world scenario. However, this group has made further strides towards hybrid working implementation.

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ITDMs in the life sciences, manufacturing, healthcare and telecom industries report the biggest disparities between their current and ideal working scenarios.

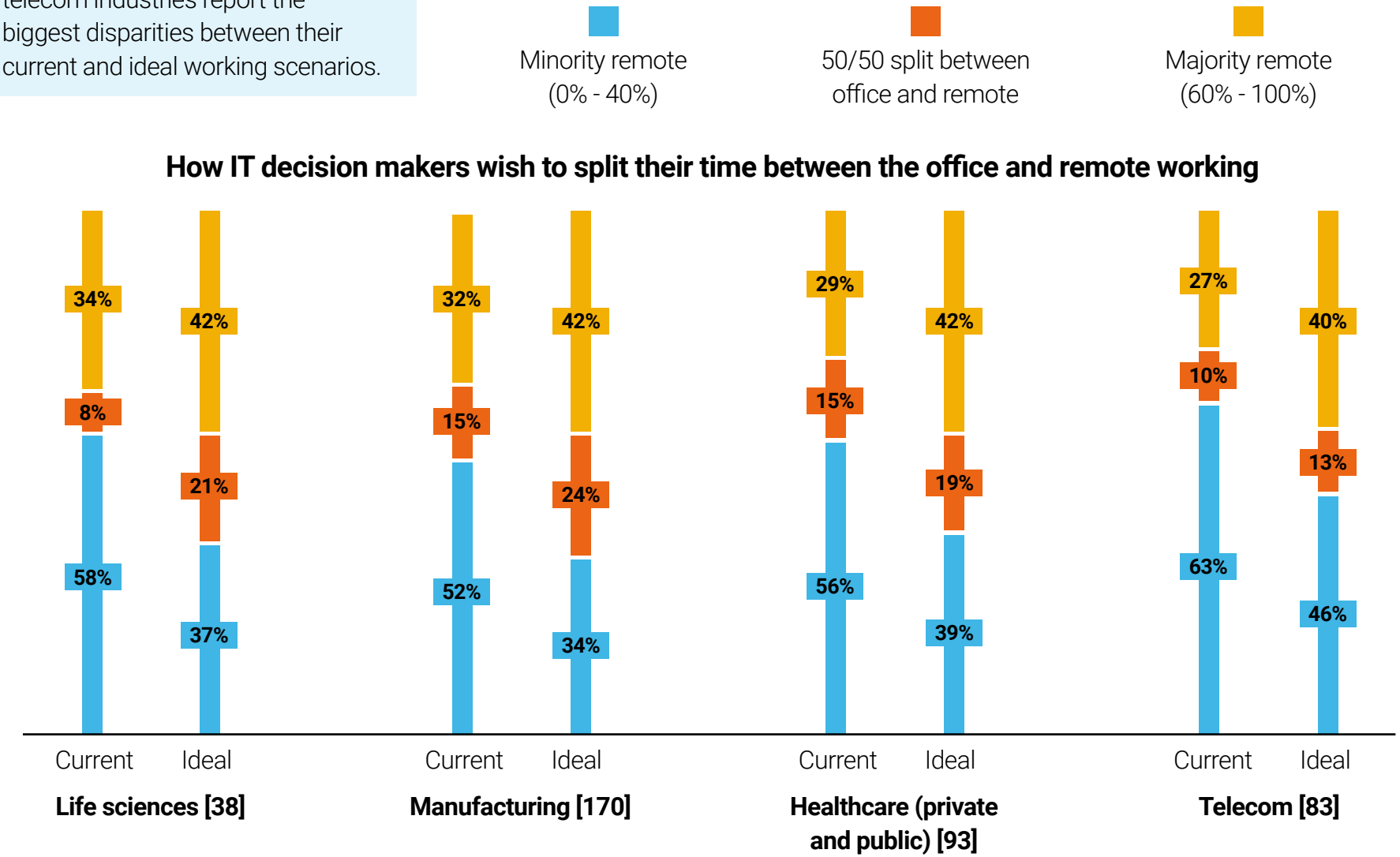

Figure 9: How do you currently split your time between the office and remote working and what would this split look like in an ideal world? [Base sizes in chart], split by sector (Q20)

Respondents' desire to "work from anywhere" is likely driven by the concerns that respondents have when considering returning to a physical working location.

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Personal worries for ITDMs when thinking about going back to a physical working location

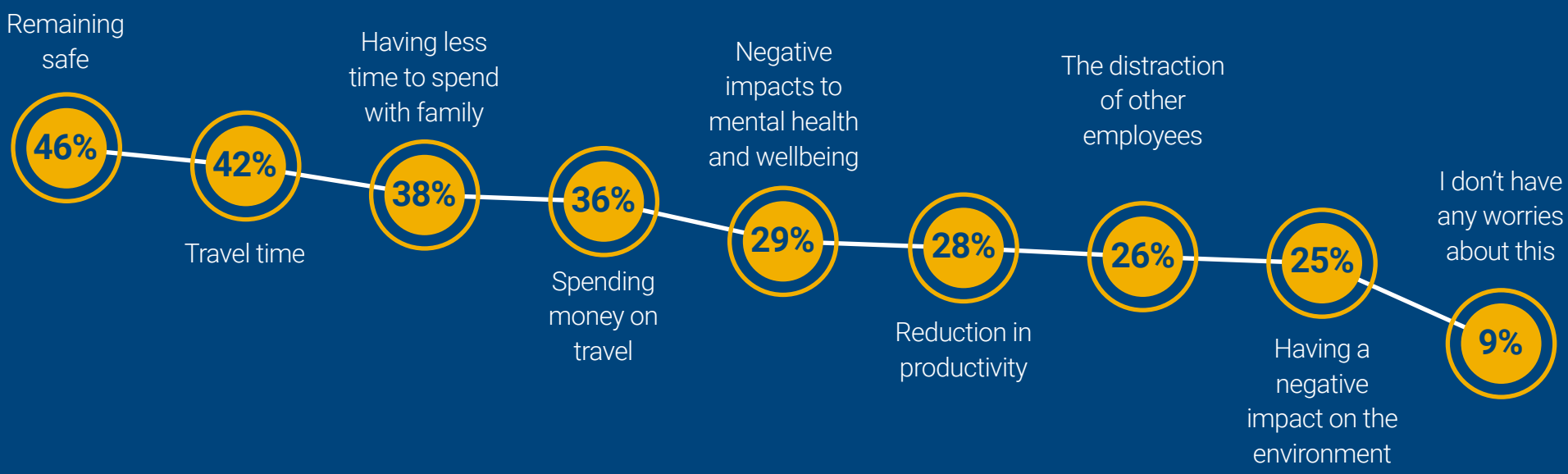

Figure 10: Which of the following worries you personally about the idea of going back to a physical working location? [2,000] (Q19)

Respondents in Mainland China are much less likely to be worried about travel time (27%) and spending money on travel (28%), versus the global average. Respondents in EMEA are much less concerned about going back to a physical working location than their counterparts in APJ (86% EMEA versus 93% APJ versus 89% total).

When it comes to comparing industries, respondents from healthcare are the most likely to report nearly all of the worries. The most prominent (compared to the global average) being:

» Travel time (54% vs 42%)
» Having less time to spend with family (53% vs 38%)
» Negative impacts to mental health and wellbeing (42% vs 29%)

While remaining safe was a key area for nearly half (49%) of healthcare respondents, it was actually those from the higher education sector (57%) were the most likely to be worried about this.

These worries are further cemented when respondents think about the biggest benefits to them personally when working remotely.

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The biggest personal advantage of working remotely is health and happiness.

ITDM in the primary education sector

Although I am committed, I tend to work even harder, but enjoy the benefits of having all my work completed before due dates. I have more time during the day for family things and start working from 04:00 when the family is still asleep.

ITDM in the higher education sector

Remote work enables companies to embrace diversity and inclusion by hiring people from different socioeconomic, geographic, and cultural backgrounds and with different perspectives - which can be challenging to accomplish when recruiting is restricted to a specific locale that not everyone wants, or can afford, to live near.

ITDM in the commercial sector

When working remotely, I get access to work when I'm comfortable to, without the hassle of over burdening myself at one particular point of time. Additionally, it helps escape the tiresome journeys of travelling to-and-from my office and home thus saving my energy by quite a significant amount.

ITDM in the commercial sector

It's evident that respondents value flexible work environments and the many benefits that come with it. By being able to "work from anywhere", people can remain productive and, more importantly, remain happy. How can organizations reach this goal?

Figure 11: What is/do you think would be the biggest benefit to you personally when working remotely? [2,000] (Q21)

Empowering the workforce through technology

Technology truly is the backbone of the modern organization. All rely on it to operate on a day-to-day basis. And this dependency is only set to increase with the continued shift towards a "work from anywhere" model.

This necessity is clearly evident when looking at technology investment over the last year. Nearly all (99%) surveyed organizations who are working to a hybrid model have invested in technology over the last year, versus 93% for those who are not.

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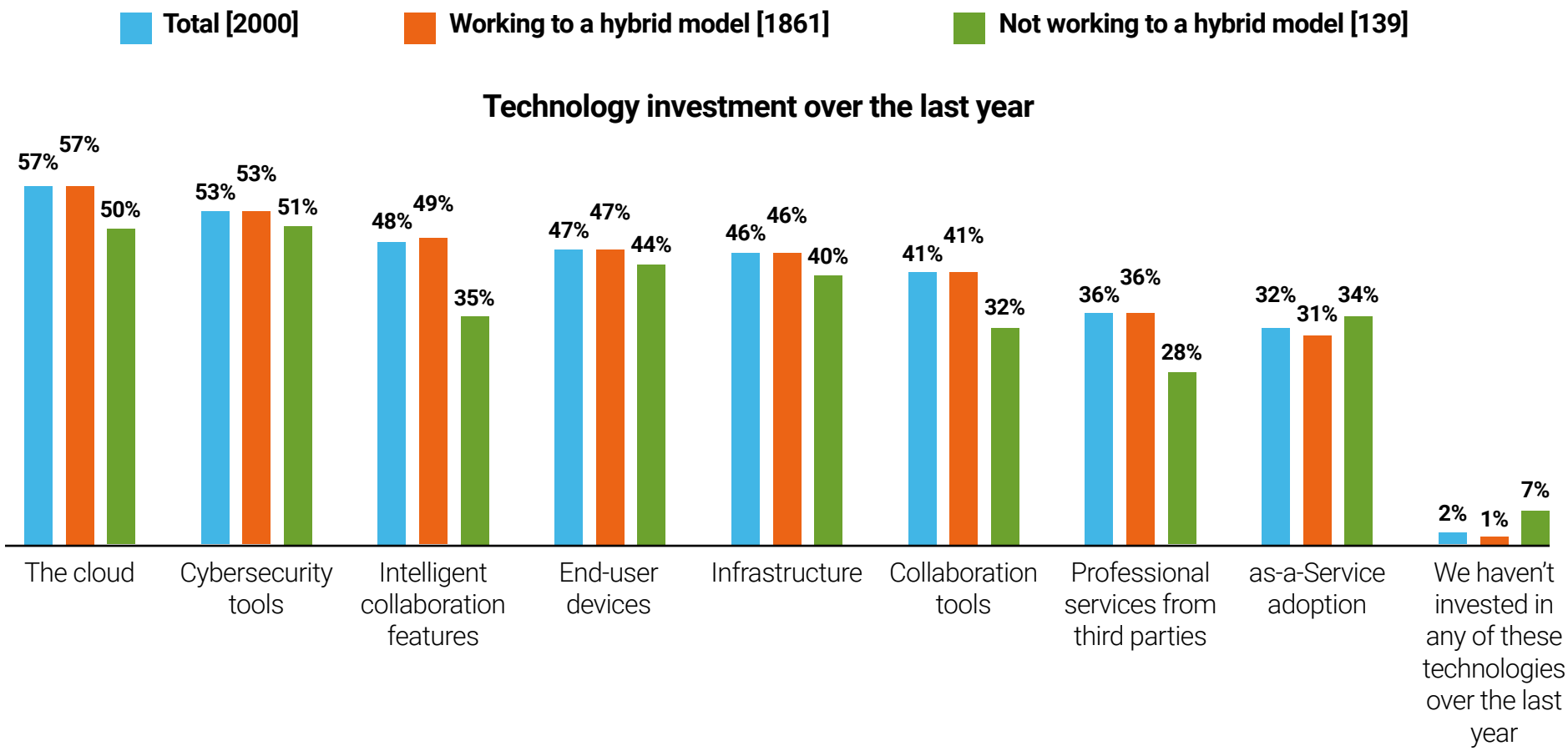

Figure 12: Which of the following technologies, if any, has your organization invested more in over the last year? [Base sizes in chart], split by how respondents are currently working within their organization (Q12)

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As organizations look to the future, those that have employees working remotely will continue to invest in technology in order to support a hybrid working model.

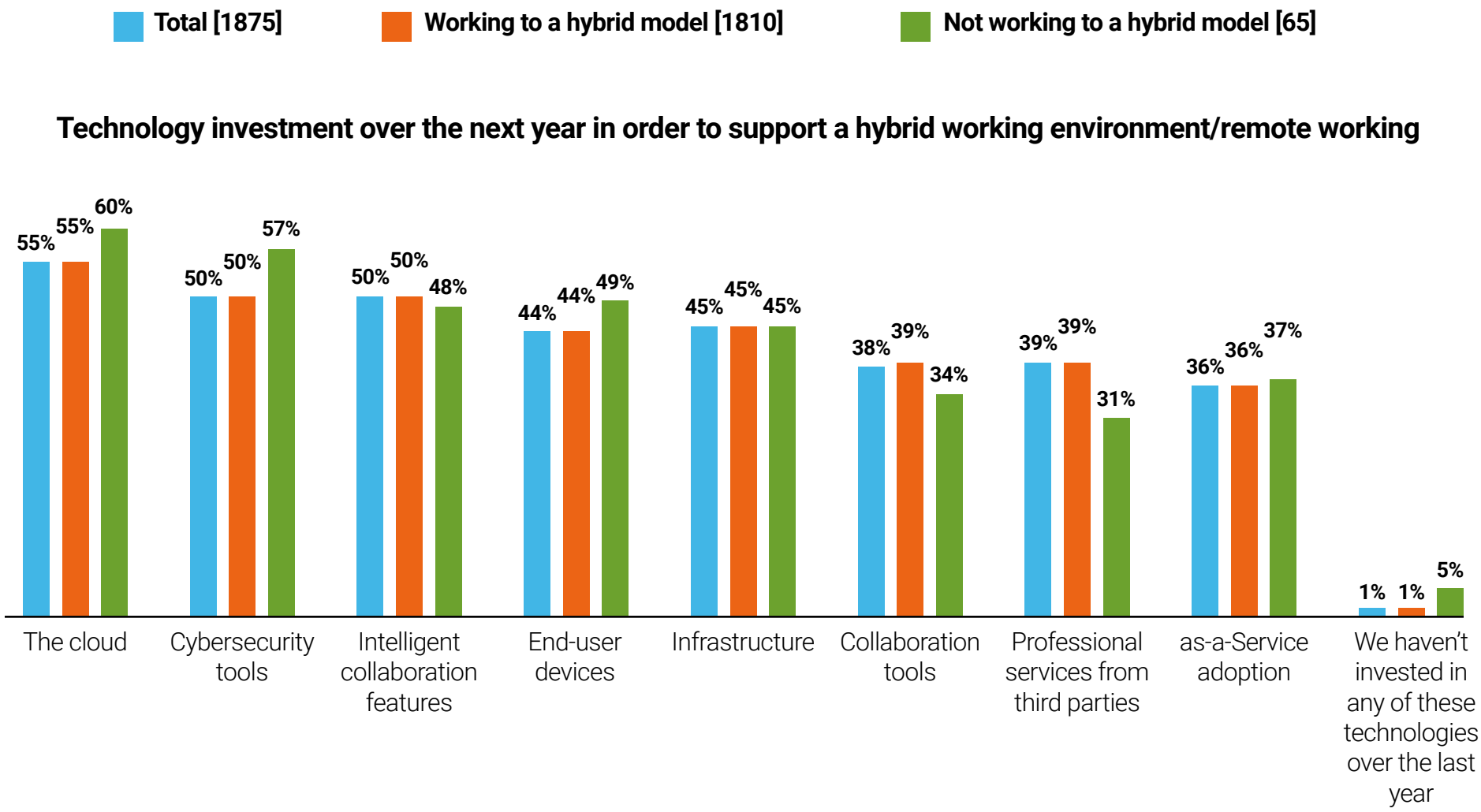

Figure 13: Which of the following technologies, if any, will your organization invest more in over the next 12 months in order to support a hybrid working environment/remote working? [Base sizes in chart] organizations who have some or all of their employees working remotely, split by how respondents are currently working within their organization (Q13)

While the cloud (55%) and cybersecurity tools (50%) remain top of the list when it comes to overall investment, it is actually those not working in a hybrid environment that are more likely to invest in these areas.

Investment in the cloud and cybersecurity tools over the next 12 months

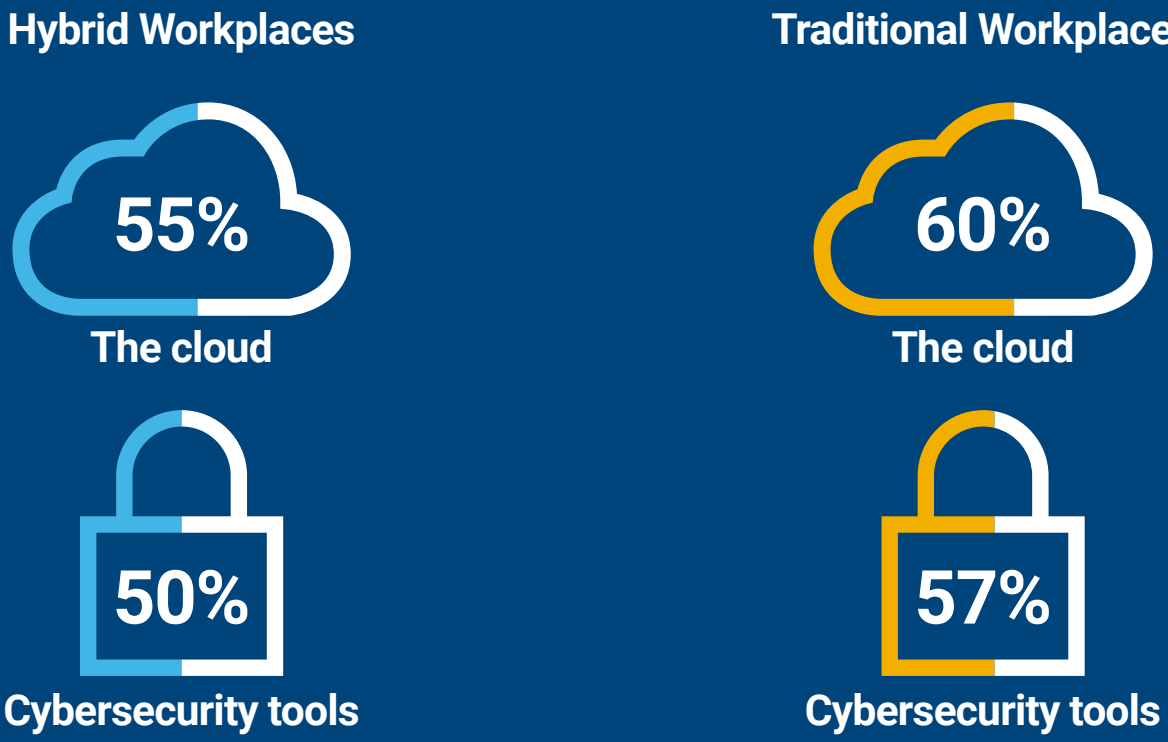

Figure 14: Percentage of respondents who will invest in the cloud and/or cybersecurity tools over the next 12 months [2,000] split by how respondents are currently working within their organization (Q13)

Even as some organizations make the move back to the office, it's evident that these technologies are not only reserved for those working in a hybrid model. By providing all employees with the right technologies, organizations are able to empower them to do better, especially when they embrace the "work from anywhere" mindset. Empowering employees to work remotely is an area that well over four fifths (86%) of surveyed organizations are struggling with (Q15) but for nearly all, technology is the answer.

So while organizations are turning to technology to empower their future workforce, do they expect to adopt a "work from anywhere" mindset?

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The “work from anywhere” mindset

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A “work from anywhere” mindset and attitude ensures that irrespective of their working location, employees have equal opportunities and access to the applications and data they need to do their job; it doesn’t matter where you are in the world, the technology used affords employees the opportunity to “work from anywhere”.

It’s a mindset that resonates with IT decision makers and the majority (86%) agree that all organizations should be adopting this practice. Agreement levels gently fluctuate throughout different sized organizations and those from different industries, but the sweeping view is the same as that of the global average.

Almost all (96%) respondents report that their organization is looking to adopt this kind of ethos, with 14% confirming that they’ve already done so (Q18). Adoption amongst different industries is widespread, with higher education the most likely (20%) to have already adopted, followed closely by life sciences (18%). Those from primary/secondary education and healthcare are the least likely to have already adopted this “work from anywhere” mindset, highlighting perhaps that for these industries, this sort of mindset doesn’t work as well.

It is evident that belief in this flexible working mentality is high, however the vast majority of ITDMs (95%) have worries when it comes to supporting this model within their organization.

Worries for ITDMs when thinking about supporting a "remote-first" model

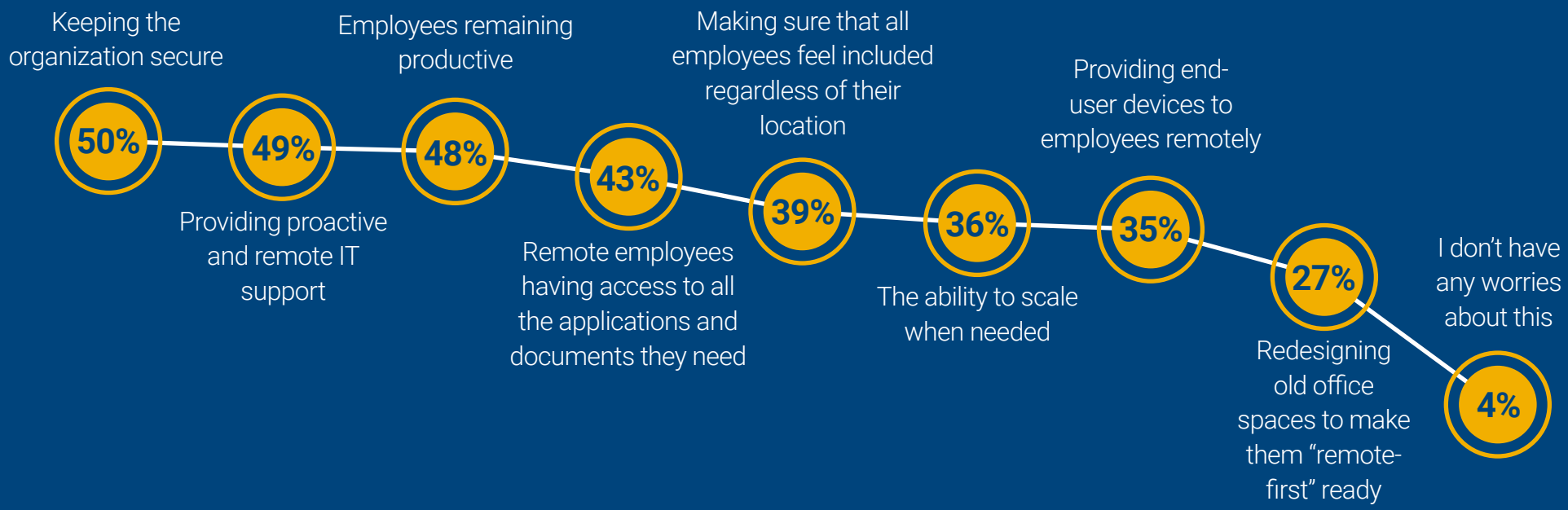

Figure 15: Which of the following are worries for you when thinking about supporting a "remote-first" model within your organization? [2,000] (Q16)

When comparing different sized organizations and those from different industries, worries remain similar. Keeping the organization secure stands out as a top challenge for most, along with providing proactive and remote IT support.

In addition to these worries, there are other areas which require improvement in order for organizations to really become immersed in the "work from anywhere" mentality. These areas include optimizing collaboration tools for both remote and office workers (89%), optimizing application performance for both remote and office workers (88%) and allowing equal access to data/information regardless of employees' locations (87%).

To fully support the idea of "working from anywhere" and realize the benefits it can bring their business, organizations need to shift the way in which they utilize technology.

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The benefits of hybrid working

Powered by technology, hybrid working and the associated "work from anywhere" mentality brings organizations untold benefits.

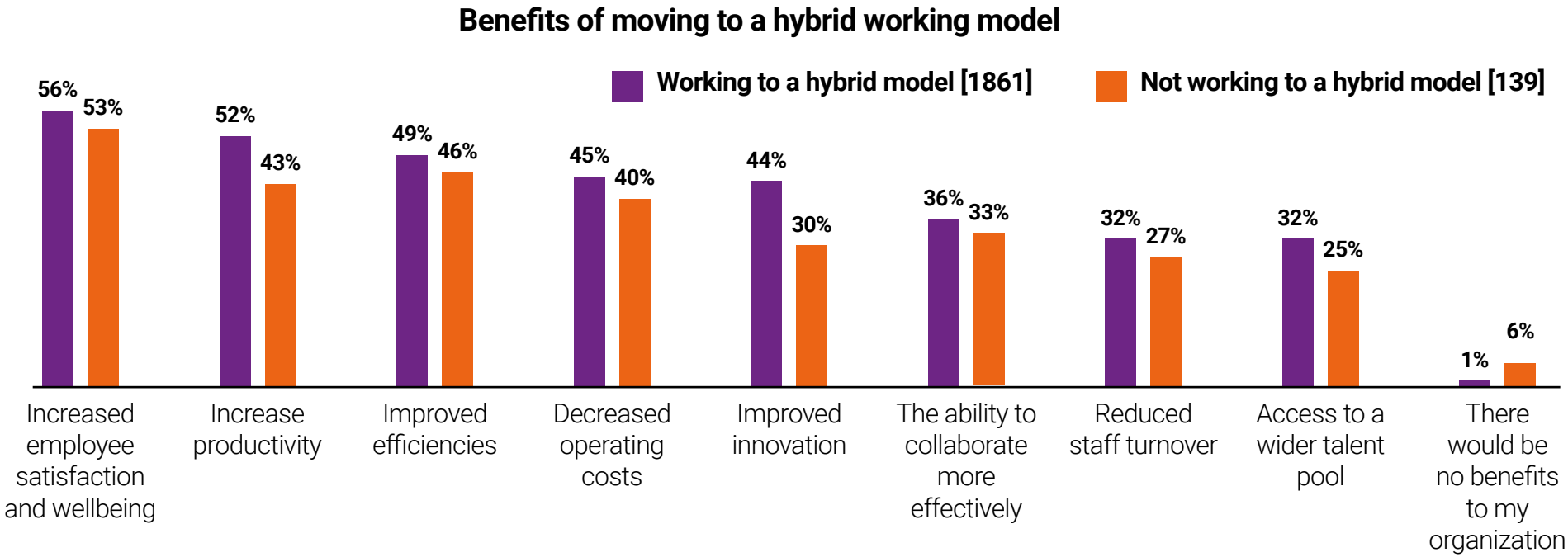

Figure 16: Which of the following benefits, if any, do you think your organization could experience if it moved to a hybrid working model? [Base numbers in chart] split by how respondents are currently working within their organization (Q8)

Those already working in a hybrid model report increased employee satisfaction and wellbeing, increased productivity and improved efficiencies as benefits they've experienced. They are also less likely to believe that there are no benefits at all to their organization.

These benefits are amplified when organizations embrace the right technology for the job. For example, those who have invested in as-a-Service adoption are also more likely to report the ability to collaborate more effectively (48% vs 36%), improve innovation (54% vs 43%) and increase productivity (58% vs 52%).

The as-a-Service model gives organizations the ability to implement software, infrastructure and PCs in a quick and flexible way and most importantly, at scale. This is essential for any organization, especially when considering a business continuity plan. With very little notice, organizations can scale up capabilities, meaning they remain more agile and productive.

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In fact, those who have experienced increases in either productivity or collaboration over the last 12 months are more likely to have invested in as-a-Service technology.

34%
Increased productivity over the last 12 months

25%
Productivity remained the same or decreased over the last 12 months

35%
Increased collaboration over the last 12 months

25%
Collaboration remained the same or decreased over the last 12 months

Figure 17: Which of the following technologies, if any, has your organization invested more in over the last year? [2,000] split by how productivity and collaboration have changed of the last 12 months (Q12)

It's clear that the as-a-Service model benefits fully support the hybrid working mentality. Its flexible nature allows organizations to seamlessly scale up and down the resources they need, which is having a positive influence over productivity and collaboration.

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For nearly three quarters of surveyed organizations, productivity (72%) and collaboration (72%) increased over the last 12 months and this trend is expected to continue over the next 12 months.

Productivity and collaboration change in organizations

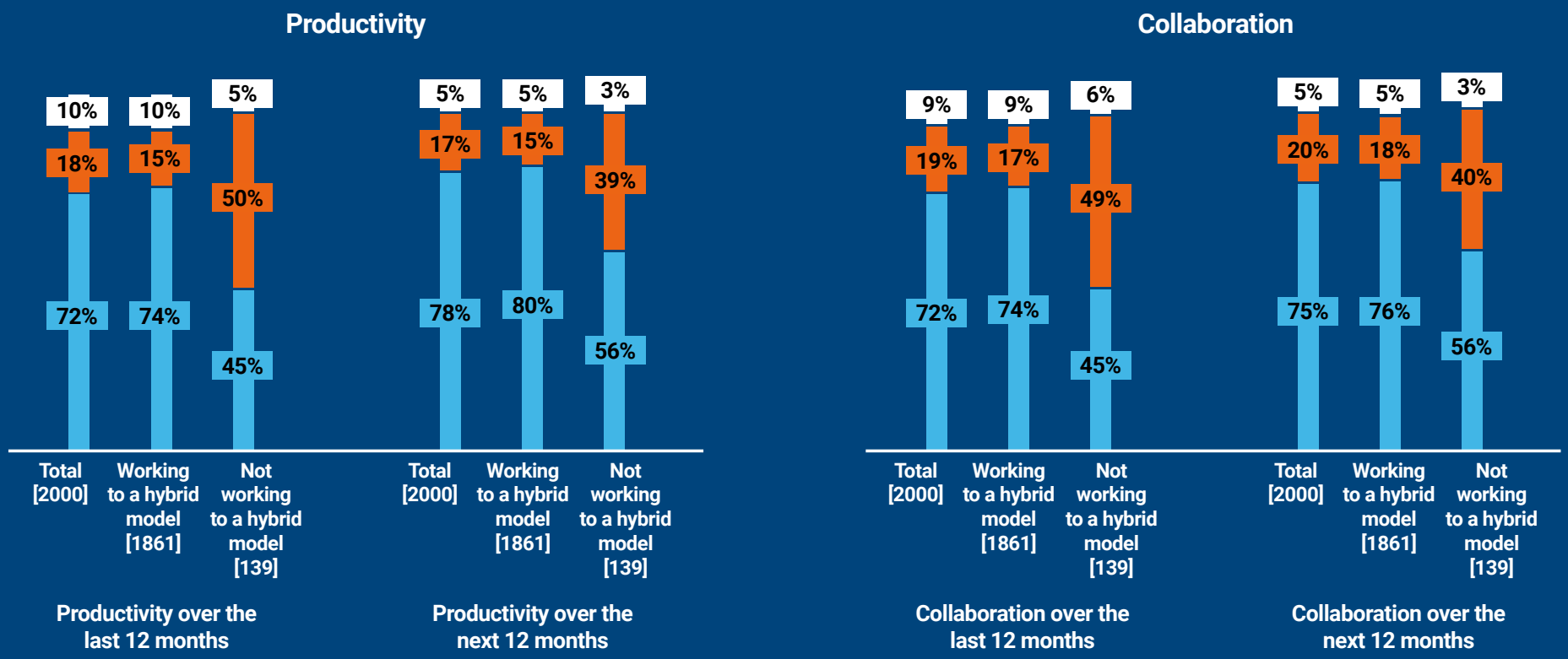

Figure 18: How has productivity and collaboration changed within your organization over the last 12 months? / Overall, how do you expect productivity and collaboration to change within your organization over the next 12 months? [Base sizes in chart], split by how respondents are currently working within their organization, omitting some answer options (Q10a / Q10b)

Those who have experienced an increase in productivity are more likely to invest in areas like intelligent collaboration features (51% vs. 39%), cybersecurity tools (56% vs. 45%) and infrastructure (49% vs. 39%) (Q12). Similarly, those who reported an improvement in collaboration were more likely to invest in these same areas.

Regardless of how organizations decide to adopt a hybrid approach to working, investment in the right technologies has enabled them to boost productivity and collaboration, which in itself is a massive win.

Conclusion

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Powered by digital transformation, organizations around the globe have become very aware of a new way of working. The move towards working from anywhere has instigated a change in the way they operate and enable borderless innovation and collaboration - and it's here to stay.

For the majority, it has irrevocably changed the way they support their workforce and this can't be ignored. Employees no longer consider flexible working a privilege, it is now an expected requirement and a competitive advantage for attracting and retaining the best talent.

In order to enact a successful "work from anywhere" ethos, organizations must embrace technology. Enabling employees to seamlessly access the data, applications and resources they need to perform their roles, regardless of where they work, should be at the core of every hybrid working strategy.

Empowering the workforce through modern technology (regardless of the approach taken to hybrid working) delivers crucial and tangible benefits, including greater employee satisfaction and productivity.

While for some the journey to flexible working is just beginning, those rethinking their approach to IT with flexible, secure and responsive technologies are equipped to thrive and succeed beyond the reach of competitors.

How Dell Technologies, Intel, and VMware Can Help

DELL Technologies

No matter where your organization finds itself today, the dedicated team behind Dell Technologies will stop at nothing to help you remove the complexities that come from supporting dispersed people, applications and data. We're here as your trusted technology partner to guide you to achieve a digital workplace that's ready for anything and delivers the best possible experience.

intel

On-premises, in the public cloud, or at the edge, Dell Technologies and Intel work together to ensure optimal performance across a broad range of workloads. Intel's data-centric portfolio is built on decades of application optimizations, designed to help your business move faster, store more, and process everything from edge to cloud.

vmware

Together, VMware and Dell Technologies provide unique value to our shared customers. Our integrated platforms and solutions, combined with global scale and deep customer engagements, accelerate the journey to digital transformation. VMware's innovative app modernization, multi-cloud, and Anywhere Workspace software work with Dell Technologies' broad IT portfolio spanning from endpoints to the cloud to help customers achieve secure, consistent operations and faster time to value.

LEARN MORE

About the research

Dell Technologies commissioned independent market research agency Vanson Bourne to conduct research into the state of hybrid working within organizations. The study surveyed 2,000 ITDMs in May and June 2021 from organizations with 100 or more employees across all public and private sectors, with a specific focus on financial services and education organizations. All interviews were conducted using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.