A Forrester Consulting Thought Leadership Spotlight
Commissioned By Dell Technologies

July 2020

Optimize Your Hybrid Workforce With Flexible Work-From-Home Policies And Monitors

In just a few short months, disruptive forces have altered the way we work and live. Offices and shops were forced to shut temporarily with little warning. Not all businesses were prepared to transition their workforces to a predominantly work-from-home arrangement, but in just a matter of weeks, the percentage of employees working from home globally increased exponentially — from an estimated 5% last year to a high of 60%.[1]

How are employees managing this abrupt change to their work lives, amid equally disruptive changes to their daily lives? And what are organizations doing to support employees as they adapt to these new ways of working?

KEY FINDINGS

› **The shift to working from home has had tremendous impact on many aspects of employee experience.** Besides a change in physical environment, employees are grappling with changes in ways of working, modes of communication, and the workstation equipment available to them. Thirty-seven percent of workers report a downgrade in the specifications of the monitors they are using at home.

› **Dealing with the cumulative effect of all these changes is overwhelming and distracts employees from their work.** As such, one-third report that they are less productive working from home.

› **For now, many employees are still not ready to return to the office.** One-third are concerned about health and safety in the workplace, and almost half would like to continue working from home, even after the crisis subsides.

› **Remote work is set to become the norm, and organizations are rethinking their workplace policies.** Two-thirds (67%) of decision makers say their organizations are extending remote working arrangements for some employees moving forward.

The percentage of employees working from home globally has increased exponentially — from an estimated 5% last year to a high of 60%.

Dell Technologies commissioned Forrester Consulting to conduct custom research to explore how employee experience has been impacted by disruptive changes in 2020 — in particular, how organizations are supporting and enabling their employees with the right technology and tools to work productively from home.
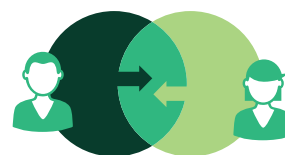
METHODOLOGY

In this study, Forrester conducted two online surveys in June 2020 with 305 knowledge workers and 155 technology decision makers to explore how they have managed the changes and challenges in their transition to remote working arrangements, as well as their outlook on how their future work experience might look. Forrester also supplemented the findings from these two custom surveys with its own PandemicEX survey of 2,384 knowledge workers, conducted in May 2020.

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Overwhelming Changes Are Disrupting Employees' Productivity

Businesses were not the only ones that had to adapt quickly in these unprecedented times; their employees have also had to adapt to changes in their work environments, homes, and lifestyles. With mandated office closures across different nonessential sectors, an estimated 60% of knowledge workers have had to start working from home. In addition to the shift from a dedicated workspace in the office to a makeshift home office, our survey findings show that the changes extend beyond the work location:

> **Modes of communication and collaboration have shifted.** In place of face-to-face interactions with coworkers, the use of video and audio-only calls and meetings have become more prevalent. Ninety-one percent of respondents now spend at least half an hour each day on video calls, up from 62% pre-pandemic. The average daily time spent on these video calls has also more than doubled — from 52 minutes pre-pandemic to 2 hours and 10 minutes. At the same time, the average daily time spent on audio calls has increased by 45 minutes to 2 hours and 6 minutes.

> **Employees face physical distractions at home.** The most common complaints home workers make of their situation include the lack of a quiet space at home (19%) and children and/or pets frequently interrupting meetings (17%). These distractions at home further add to the stream of interruptions that employees already face in the daily course of their work.

> **Uncertainties about the near future are also taking a mental toll.** According to Forrester's PandemicEX survey, 39% of workers have expressed concerns over job security, and 30% are worried that their companies "may not make it financially and have to close completely".[2]

Physical distractions at home, general stress and uncertainty, and disruptions to established ways of working all add up to overwhelming changes that distract employees from their work and sap their cognitive capacity (see Figure 1).

Physical distractions at home, general stress, and disruptions to established ways of working add up to overwhelming changes that distract employees from their work and sap their cognitive capacity.

Figure 1

Distractions, even if momentary, keep employees from achieving flow, and from making progress toward important work.
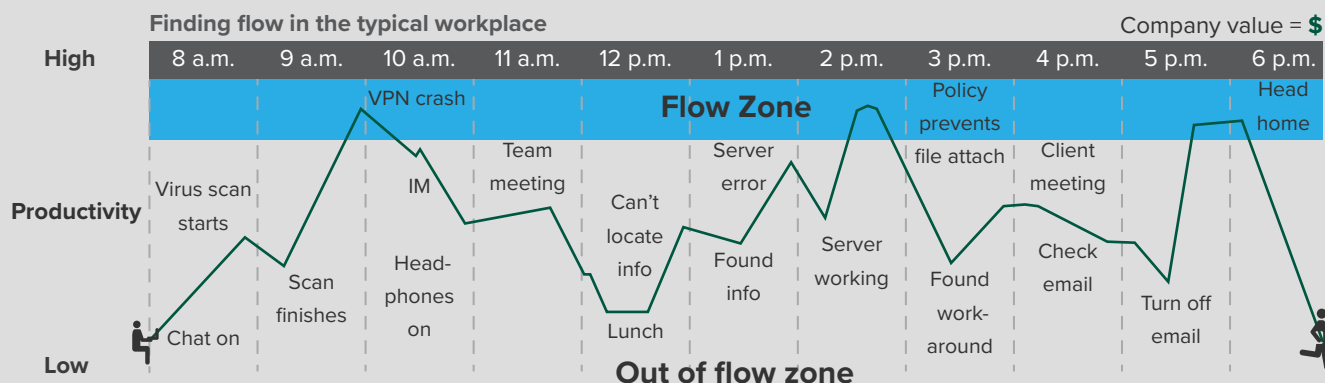
Employees already face a constant stream of distractions in the workplace.

Remote working introduces further interruptions to their flow of work.

Source: Engineer Your Technology Environment To Improve Employee Productivity And Flow," Forrester Research, Inc., December 15, 2017
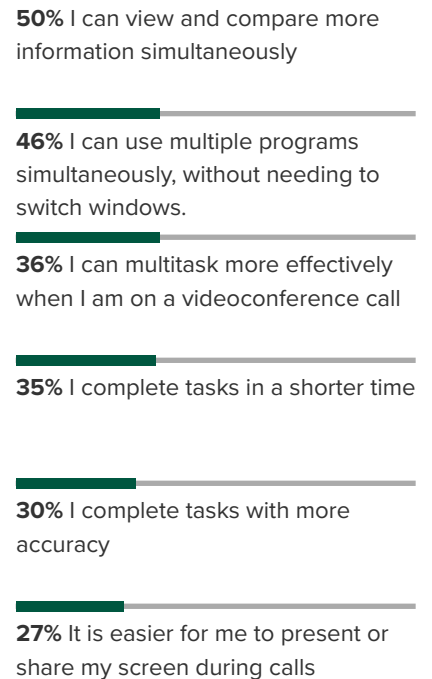
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LESS THAN IDEAL HOME WORKSTATION SETUPS ARE AFFECTING PRODUCTIVITY

Many workers find that their home offices are not as well-equipped for productivity. Employees lack access to external monitors and peripherals, which facilitate interactions with a computer and can improve employee efficiency (see Figure 2).

› **A significant number of employees are not using their usual computing device.** Thirty-eight percent of knowledge workers surveyed have switched computing devices while working from home — e.g., from a desktop PC to a laptop — creating further cognitive drain as they have to get used to a new device.

› **While laptop usage has increased significantly, the use of computing peripherals has only decreased moderately.** To enable remote access, many businesses have provisioned laptops for their employees to work from home, and, consequently, the number of laptop users has increased by 70%. However, the use of an external keyboard and mouse has only dropped by 20% and 9% respectively, suggesting that many workers still prefer the ease and comfort of using external peripherals, instead of the integrated mouse and keyboard in a laptop.

› **At a time when employees need the most help staying focused and productive, many have seen a downgrade in their monitor setup at home.** Thirty-seven percent of workers report a downgrade in the specifications of the monitors they use at home — for instance, switching from using dual monitors in the office to a single monitor (smaller than 24") at home or moving from a larger monitor to a smaller monitor or laptop screen. This has critical impact on productivity: Users reporting a downgrade in their monitor setup are twice as likely to see a setback in productivity.

› **Employees are missing out on several advantages of having a secondary or external monitor.** With more time spent on video calls, an external monitor helps employees multitask and collaborate more easily: 36% of knowledge workers appreciate the ease of multitasking while on a video call while 27% find it easier to share their screen during calls. Furthermore, external monitors also improve productivity: Employees report being able to view more information simultaneously (50%), use multiple programs simultaneously without having to switch windows (46%), and complete tasks more quickly (35%) and more accurately (30%) (see Figure 3).

Figure 3

"Which of the following benefits of having an external monitor do you find most relevant?"

50% I can view and compare more information simultaneously

46% I can use multiple programs simultaneously, without needing to switch windows.

36% I can multitask more effectively when I am on a videoconference call

35% I complete tasks in a shorter time

30% I complete tasks with more accuracy

27% It is easier for me to present or share my screen during calls

Base: 305 knowledge workers who had been working from home for at least six weeks
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, June 2020

Users reporting a downgrade in their monitor setup are twice as likely to see a setback in productivity.

Figure 2

Changes in workstation setups in the office vs. at home

■ In the office ■ At home

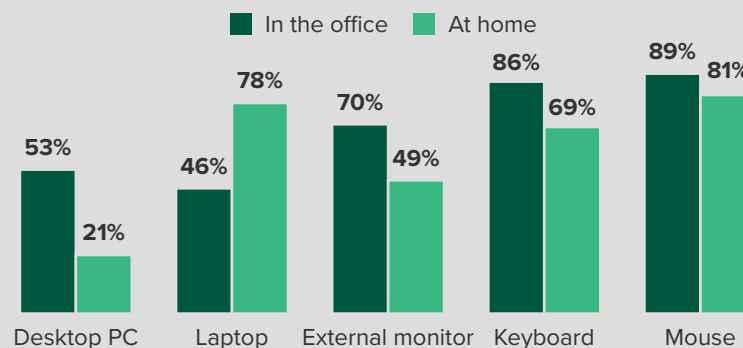|	Desktop PC	Laptop	External monitor	Keyboard	Mouse
In the office	53%	46%	70%	86%	89%
At home	21%	78%	49%	69%	81%

Base: 305 knowledge workers who had been working from home for at least six weeks
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, June 2020

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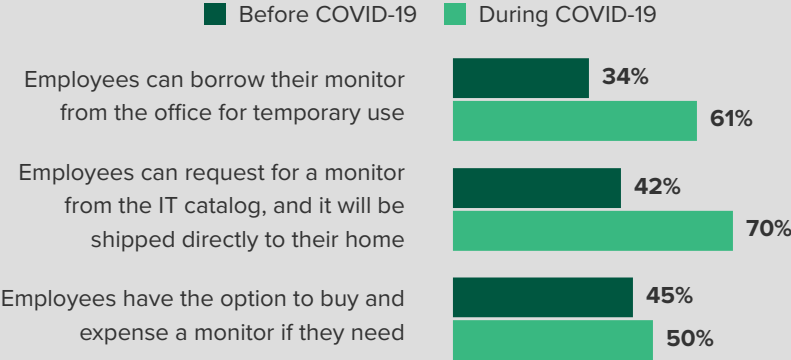# Organizations Have Expanded Support For Employees Working From Home

To support and enable these new modes of operations, 56% of IT decision makers surveyed report that their organizations have increased their overall IT and hardware budgets for the year.

› **Firms have made it easier for employees to get access to a monitor while working from home.** Seventy percent of decision makers say their organizations now allow employees to request for an extra monitor to be shipped to their homes, while 61% say their firms have allowed employees to bring one home from the office as a temporary measure. Half report their firms are giving employees the flexibility to buy, and then expense, a monitor of their choice (see Figure 4).

› **However, employees may not even be aware that these options are available to them.** Forty-one percent still feel that their company "doesn't have the technology resources to allow people to work from home," and only 12% say that they have been given a discretionary budget to buy supplies or work-from-home gear.

› **Consequently, most employees are using their personal monitors while working from home.** Of the respondents who are using a monitor at home, 60% are using their personal equipment, 20% are using a monitor provisioned by their company, and the remaining 20% are using one borrowed from the office as a temporary measure.

› **Nonetheless, a significant number of employees are not supported by their ideal monitor at home.** In addition to employees who are facing a downgrade in their monitors, 7% want but do not have access to monitors at home.

More than ever, business leaders need to proactively support their employee experience at home. When employees feel well supported in a remote working arrangement, they are more likely to report higher well-being and reduced stress levels.[3]

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Figure 4

"What measures has your organization taken to help employees stay productive while working from home?"

■ Before COVID-19　■ During COVID-19

Employees can borrow their monitor from the office for temporary use
- Before COVID-19: 34%
- During COVID-19: 61%

Employees can request for a monitor from the IT catalog, and it will be shipped directly to their home
- Before COVID-19: 42%
- During COVID-19: 70%

Employees have the option to buy and expense a monitor if they need
- Before COVID-19: 45%
- During COVID-19: 50%

Base: 155 technology decision makers whose employees had been working from home for at least six weeks
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, June 2020

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Lingering Safety Concerns Necessitate Flexible Work Arrangements For All

MANY EMPLOYEES ARE NOT READY TO RETURN TO THE OFFICE

Even as offices reopen, many employees are signaling that they are not ready to return to business as normal:

› **Employees have lingering concerns about their safety.** Forrester's PandemicEX survey found that 23% of workers say they do not want to go back to work until there is a vaccine while more than one-third (36%) are worried that their company will insist on making them go back to work before they feel safe there.

› **Employees are divided on where they prefer to work.** Forty-seven percent of respondents in Forrester's PandemicEX survey prefer working from home while 42% look forward to heading back to the office.

Organizations need to be sensitive to the needs and preferences of all employees. Rushing them back to work when they are not ready might create a psychologically unsafe workplace for these employees.[4]

ORGANIZATIONS NEED TO STAY ADAPTIVE IN AN AMBIGUOUS FUTURE

Organizations are considering factors such as employee support for remote working arrangements, health and safety in the office, and readjustments in workplace capacity while implementing a range of measures and policies in their return-to-work plans:

› **Remote work is here to stay.** Two-thirds (67%) of decision makers say that they will be extending remote working arrangements for some employees in the long term while 57% say they are introducing more flexible work-from-home policies for all of their employees.

› **A hybrid workforce increases the need for flexible meeting spaces in the office.** To accommodate more flexible working arrangements for a hybrid workforce (that has a mix of on-site and home-based workers), many organizations are also considering changes to the office floor: 40% of surveyed decision makers say they are implementing a transition to a hot desking arrangement. Forty-six percent will be increasing the number of meeting rooms to allow on-site workers to collaborate more effectively with their remote coworkers or clients. Furthermore, most organizations are also considering the impact on office capacity: while some are considering a reduction in office floor space as more workers go remote, others are considering an expansion to accommodate social distancing.

While there might not be a one-size-fits-all approach to managing organizations' return-to-work plans, the key guiding principle for organizations should be to place their employees' safety and emotional needs first and ensure that employees are well supported wherever they choose to work.

36% of employees are worried that their company will insist on making them go back to work before they feel safe there.

67% of decision makers have decided to extend remote working arrangements for some employees in their return-to-work plans.

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Key Recommendations

With the sudden shift to working from home and the likelihood that such remote working practices will continue in the foreseeable future, organizations must rethink their workplace management strategies and practices.

This study yielded several key recommendations:

Strengthen employee experience first. Actively listen, empathize, and get input from employees. To understand them better in these disruptive times, organizations must augment survey-based insights with interviews and observations in their work environment – whether that is in the office or at home. Especially in these troubled times, understanding your employees, their concerns, and needs, what is best for their well-being and productivity will be key to ensuring a successful business recovery.

Offer flexibility in working arrangements for employees. With differing health and safety concerns, needs, and preferences among employees, organizations should provide employees autonomy to decide the working arrangement that works best for them. To help employees stay connected with each other and with the organization at large, offer training and upskilling programs, as well as activities to promote mental wellbeing and reinforce team identity. All these can help to raise employee morale and enliven the employee experience.

Prepare your office for a hybrid workforce. With organizations and employees indicating a preference for continued remote working, decision makers must revisit their office space planning. As more meetings go virtual, firms must carefully plan for their meeting spaces in the office. In addition to quiet spaces for individuals, plan for modular meeting spaces that allow employees to connect and collaborate easily.

Enable employees to perform at their best with the right monitors and home office tools. In the future, employees are likely going to be working from home more often — whether out of preference or need. Providing them with laptops (which allow remote access), as well as the right monitors and peripherals, that offer the same level of specifications, ergonomics, and comfort as the office not only promotes a conducive environment and higher productivity, but it also makes them feel well supported and contributes to a better employee experience.

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Appendix A: Firmographics And Demographics

FIRMOGRAPHICS

COUNTRY

United Kingdom	28%
United States	28%
India	16%
Australia	11%
Canada	5%
France	4%
Germany	2%
Hong Kong	2%
Singapore	2%
The Netherlands	1%
New Zealand	1%

INDUSTRY

Technology and/or technology services	15%
Manufacturing and materials	15%
Financial services and/or insurance	12%
Electronics	7%
Retail	7%
Construction	6%
Business or professional services	5%
Consumer services	5%
Transportation and logistics	5%
Healthcare	3%
Government	3%
Consumer product goods and/or manufacturing	3%
Telecommunications services	3%
Education and/or nonprofits	3%
Energy, utilities, and/or waste management	3%
Media and/or leisure	2%
Advertising and/or marketing	1%
Travel and hospitality	1%
Chemicals and/or metals	1%
Legal services	1%

COMPANY SIZE

- 12% — 20,000 or more employees
- 9% — 5,000 to 19,999 employees
- 16% — 100 to 499 employees
- 23% — 500 to 999 employees
- 40% — 1,000 to 4,999 employees

RESPONDENT LEVEL

- 8% — Vice president
- 17% — Senior manager
- 43% — Director
- 31% — Chief executive officer
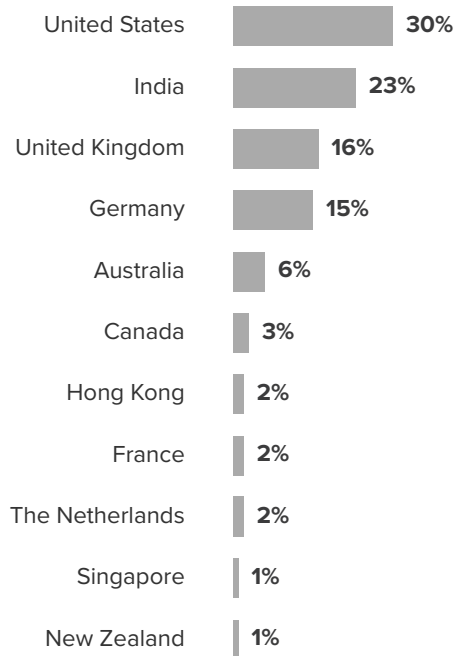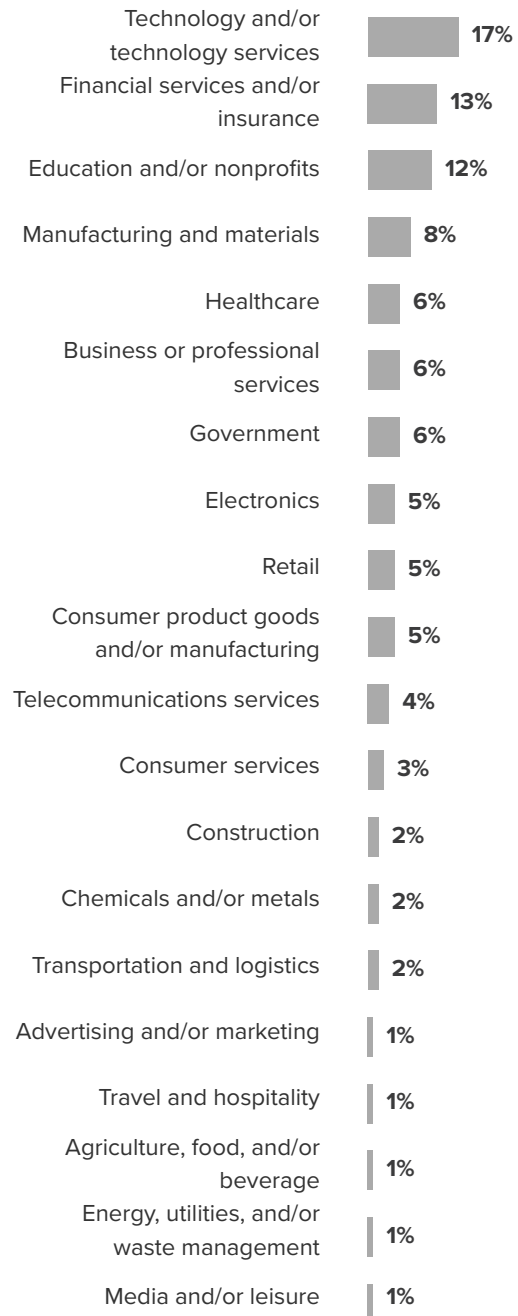
Base: 155 technology decision makers whose employees had been working from home for at least six weeks
Note: Percentages may not total 100 because of rounding.
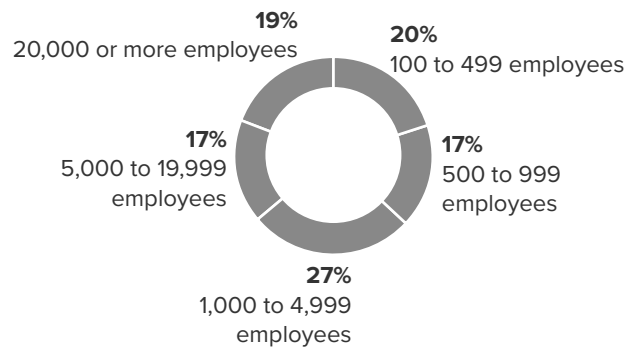Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, June 2020

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DEMOGRAPHICS

COUNTRY

United States	**30%**
India	**23%**
United Kingdom	**16%**
Germany	**15%**
Australia	**6%**
Canada	**3%**
Hong Kong	**2%**
France	**2%**
The Netherlands	**2%**
Singapore	**1%**
New Zealand	**1%**

INDUSTRY

Technology and/or technology services	**17%**
Financial services and/or insurance	**13%**
Education and/or nonprofits	**12%**
Manufacturing and materials	**8%**
Healthcare	**6%**
Business or professional services	**6%**
Government	**6%**
Electronics	**5%**
Retail	**5%**
Consumer product goods and/or manufacturing	**5%**
Telecommunications services	**4%**
Consumer services	**3%**
Construction	**2%**
Chemicals and/or metals	**2%**
Transportation and logistics	**2%**
Advertising and/or marketing	**1%**
Travel and hospitality	**1%**
Agriculture, food, and/or beverage	**1%**
Energy, utilities, and/or waste management	**1%**
Media and/or leisure	**1%**

COMPANY SIZE

19%
20,000 or more employees

20%
100 to 499 employees

17%
5,000 to 19,999 employees

17%
500 to 999 employees

27%
1,000 to 4,999 employees

Base: 305 knowledge workers who had been working from home for at least six weeks
Note: Percentages may not total 100 because of rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, June 2020

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Appendix B: Endnotes

[1] Source: Forrester Analytics Global Business Technographics® Workforce Benchmark Survey, 2019.

[2] Source: Forrester Analytics Consumer Technographics COVID-19 Survey (Wave 2), 2020 (May 8-15).

[3] Source: "How Monitors Deepen Your Employee Experience And Support Your Distributed Workforce," a commissioned study conducted by Forrester Consulting on behalf of Dell, March 2020.

[4] Source: "Returning To Work: How To Avoid The 15 Most Critical Risks," Forrester Research, Inc., June 10, 2020.

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