

A Forrester Consulting
Thought Leadership Paper
Commissioned By Dell Technologies
July 2020

How Monitors Deepen Your Employee Experience And Support Your Distributed Workforce

Drive Business Outcomes By Empowering, Enabling, And Inspiring Employees With The Right Monitors Wherever They Work From

Table Of Contents

- 1** Executive Summary
- 3** Good EX Is Critical For Good CX And Long-Term Business Growth
- 6** The Importance Of Productivity, Collaboration, And Connection To The Organization In This New Work Environment
- 9** The Role Of Monitors In Improving Employee Productivity, Collaboration, And Connection To The Organization
- 10** Boost Productivity With Ultrawide Screens And Wider Color Coverage
- 11** Enable Faster And Smarter Collaboration With Enhanced Meeting Room Solutions
- 13** Leverage Design, Privacy, And Sustainability Features For A Stronger Connection With Your Employees
- 19** Key Recommendations
- 21** Appendix

Project Director:

Line Larrivaud,
Market Impact Consultant

Contributing Research:

Forrester's Customer Experience
research group

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.

© 2020, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to forrester.com.
[E-46413]



“Organizations are looking at designing workspaces that support the new workforce, unlock productivity, and make people feel good.”

*Karen Giunta, consultant,
workplace interior design
company*

Executive Summary

In this ever-changing world, and through the rise of remote working, a good employee experience (EX) can come from many places.¹ But Forrester’s research shows that the hallmark of a good employee experience is always the same — it empowers, enables, and inspires employees. Organizational awareness on the importance of EX in driving business results is growing. Companies are realizing that as the custodians of an organization’s customer experience (CX), employees have the power to make or break an organization’s CX day-to-day.

In October 2019, Dell Technologies commissioned Forrester Consulting to explore the role of desktop and meeting room monitors in the workplace environment in creating a positive employee experience.² Forrester conducted three surveys and 10 interviews to explore this topic with:

- › Four hundred and thirty business decision makers and influencers involved in monitor/end user device purchasing and/or workplace design.
- › Eight hundred knowledge workers using a computer and/or laptop and monitor to conduct their work on a daily basis.
- › One hundred and fifty workplace environment professionals (e.g. organizational psychologists, behavioral experts, office planners, human factors experts, corporate social responsibility managers, etc.) that could speak to employee productivity, the workplace environment, employee working styles and well-being, and corporate social responsibility.
- › Ten business decision makers and influencers involved in monitor/end user device purchasing and/or workplace design.

In conducting this research, we found that the quality of the employee experience is fundamentally linked to the quality of the workplace environment, in either the traditional office space or at home. Indeed, companies undertaking workplace improvement initiatives are reporting stronger EX and business results in the form of either cost savings and/or increased revenue. On a deeper level, we analyzed the role played by technology and monitors, uncovering the specific monitor features that enhance the employee experience and how.

KEY FINDINGS

- › **Improving CX remains a key focus for organizations.** Awareness of the direct impact that CX has on business results continues to grow. Indeed, 56% of surveyed organizations say that CX has significantly grown as an organizational priority over the last two years. This study also found that these efforts are coming in many forms, including better supporting and equipping employees in delivering that optimal customer journey.
- › **Enabling employees to deliver great CX is a growing priority, and it yields business results.** With 64% of surveyed employers recognizing that EX is important to driving good customer experiences, organizations have been investing in initiatives that are aimed at improving EX. Our study found that doing so results in positive business results. For instance, surveyed organizations that have invested into employee productivity solutions over the last 12 months saw an average 14% more in business benefits in terms of cost savings or additional revenue than organizations that did not.
- › **Monitors play a key role in creating an optimal workplace environment.** As workplace practices and technology needs evolve, companies must adapt in order to facilitate a positive employee experience. Seventy-two percent of surveyed workplace environment professionals affirm that building an optimal workplace environment, with the right technology and hardware, is crucial to delivering a good employee experience. Within that, monitors are key enablers of strong EX, in an office space and at home, as 81% of surveyed employees say that monitors play a key role in their workplace environment.
- › **Monitors are critical to making employees feel more productive, collaborative, and connected to their organization.** Monitors have a direct impact on employees' productivity, collaboration, and connection to their organization — all three key factors for employee engagement and positive EX. For instance, 79% of surveyed employees are reporting that ultrawide screens increase their productivity by allowing them to perform tasks in a faster and smarter way. Our study also found that 61% of respondents say that monitor design features enable a sense of embracing new ideas and a stronger connection to their organization's values.

Good EX Is Critical For Good CX And Long-Term Business Growth

Digital disruption lowers barriers to entry, hyperadoption reduces loyalty, and a rapidly changing workforce makes it harder to retain talent. Powerful forces are changing the dynamic of organizations and how they interact with customers every day. In 2020, organizations and their CX teams are being challenged like never before. Unprecedented levels of uncertainty, driven by disruptive forces globally, have further shifted customer and employee engagement models for organizations around the world, forcing them to reconsider their priorities and their operating models. This is shown by 56% of organizations saying that CX has significantly grown as an organizational priority over the last two years.

In this ever-changing market, chief experience officers (CXOs) must continue to work with the rest of their organization to accelerate their company's recovery. While acknowledging short-term revenue losses, they must continue to deliver experiences that delight customers and drive business growth. For that, they should build stronger brand affinity and design relevant messaging that eases and engages customers in these uncertain times.

EMPLOYEE EXPERIENCE AS THE KEY TO SUSTAINABLE BUSINESS GROWTH

As disruption runs rampant and the scope for differentiation grows evermore slim, determining what to prioritize next is no easy task. Innovation, partnerships, and more all have the potential to support long-term business growth, but what organizations often forget, however, is that their employees have the potential to serve as their biggest competitive advantage. Indeed, some of the world's most successful companies tout their employees as the secret weapon behind their success. No doubt, sourcing talent is an important ingredient. As organizations engage in the war for talent and the talent (gig) economy grows in scale, another important question remains: Once an organization has the talent, how should they retain and realize that talent to their fullest potential?

Amidst disruption and increased remote working, this question remains prevalent, but the answer remains the same: invest in creating a positive EX to maintain business continuity, improve CX, and ultimately drive business performance. In defining the current state of EX, our study found that:

- › **Elevating EX has become a top priority.** EX continues to grow as a business priority as more and more organizations are seeing the link between EX, CX, and business growth. In this year's survey, 55% of employers reported that EX had grown significantly as an organizational priority over the last two years (see Figure 1). Indeed, in 2018's commissioned study, only 47% of respondents cited improving EX as a business priority.³ This year's study also found that 64% of surveyed employers recognized that EX was important to driving good CX; in comparison to only 58% of surveyed employers in 2019's study (see Figure 1).⁴ This was more so the case in the US and the UK, where 74% of surveyed employers recognized the link between EX and good CX.

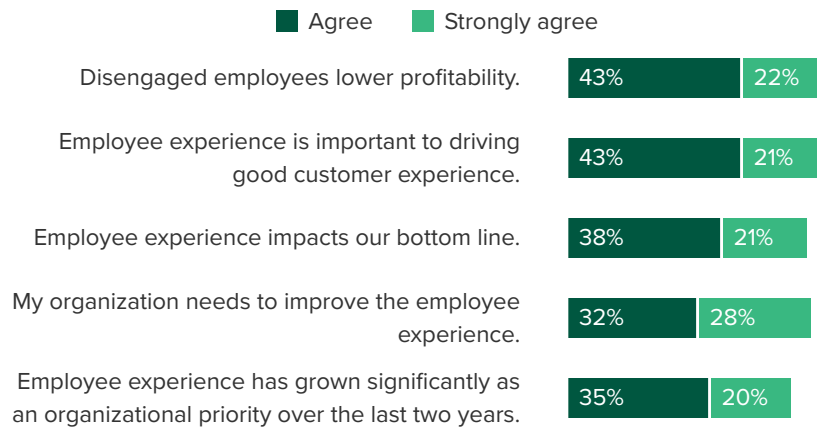


In the midst of certainty or uncertainty, drive growth through your employees.

Figure 1

“How strongly do you agree with the following statements?”

(Showing selected results)



More and more organizations recognize the role of their employees and the benefits of good EX in driving good customer experiences and profitability.

Base: 430 business decision makers and influencers involved in monitor/end user device purchasing and/or workplace design







Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

- › **Improving EX continues to propel businesses forward.** Research has shown that engaged employees are more likely to exude greater discretionary effort — resulting in stronger, more consistent customer experience delivery, and higher business performance. The incentive is there, and on top of this, there are long-term benefits to improving EX. Indeed, a study conducted by MIT found that companies with a top-quartile employee experience achieve 25% higher profits than organizations with a bottom-quartile employee experience.⁵ This year’s study, commissioned by Forrester, found that a number of different initiatives in the workplace can drive these improvements. For instance, 67% of surveyed employers recorded improved customer experiences after replacing legacy technologies and hardware (e.g. computers and monitors) used by employees (see Figure 2).
- › **Adapting the workplace environment to the new social context of work is essential for great EX.** Seventy-two percent of this year’s surveyed workplace environment professionals deemed the workplace environment crucial to delivering a good employee experience. And the benefits of this are apparent, with 61% of surveyed employers reporting higher employee well-being and reduced stress levels, and 55% registering higher employee engagement/satisfaction after investing in an office space refurbishment (e.g. new office layout, interior design, communal areas, etc.) (see Figure 2). With the significant increase in virtual/remote work, organizations are facing a new facet of the work environment: the home office. Organizations are adjusting to this new working norm in a number of different ways. For example, the state of Colorado has invested in 1,800 emergency laptops to support its newly remote workforce.⁶ Moving forward however, it is expected that more companies will begin to embrace remote/virtual work, as it survives this proof of concept and workers continue to demand more increasingly flexible ways of working.

Figure 2

“Which benefits has your company seen from these workplace improvement initiatives?”

(Showing a selection of initiatives and benefits)

WORKPLACE IMPROVEMENT INITIATIVES	TOP BENEFITS
 Replacement of legacy technologies and hardware	67% Improved customer experience 53% Higher employee engagement/satisfaction
 Investment in technology and hardware for employee productivity	53% Higher employee productivity 49% Higher employee engagement/satisfaction
 Investment in technology and hardware for employee collaboration	55% Improved customer experience 49% Increased revenue
 Refurbishment of the office space	61% Higher employee well-being and reduced stress level 55% Higher employee engagement/satisfaction
 Adoption or expansion of spaces prone for collaboration	64% Reduced of contained costs 57% Improved knowledge sharing and collaboration
 Increase in remote and mobile workers	63% Higher employee engagement/satisfaction 62% Stronger connection to company's values

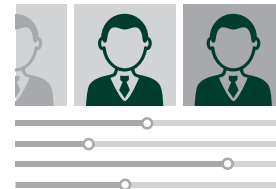
Base: 430 business decision makers and influencers involved in monitor/end user device purchasing and/or workplace design
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

HOW EMPOWERING, ENABLING, AND INSPIRING YOUR EMPLOYEES DRIVES A POSITIVE EX

To see positive business results, companies must identify and remove the barriers and inhibitors to better EX. Forrester’s Employee Experience Index shows that creating engaged and resourceful employees leads to an increase in discretionary effort from individual employees — helping organizations win, serve, and retain customers more effectively while improving business performance across a wide range of outcomes.

Out of the 75 factors Forrester includes in its EX Index analysis, 18 emerge as significant predictors of employee engagement. These are the organizational and technological factors that affect EX and contribute the most to employee engagement. These fall under three broad categories: empowerment, enablement, and inspiration.⁷

- › **Empowerment: knowing what’s most important with the latitude and support to do it.** Empowerment is a key factor that predicts employee engagement, as it encapsulates the psychological conditions driving discretionary employee work effort, creativity, and job satisfaction. By providing an environment where employees can be productive and recognized, while enabling autonomy, leaders become the strongest drivers for employee empowerment.
- › **Enablement: having the technology and resources to get important work done.** Within the knowledge workforce, enablement is especially important in predicting employee engagement. Nothing detracts from an employee’s experience more than small, regular roadblocks disrupting workflows and preventing work from getting done. Having both the right technology and access to the critical information required to complete tasks is vital to maintaining employee engagement.



- › **Inspiration: having a voice and believing in the core mission and values of the organization.** Engaged employees feel connected to their organization. A belief in the core mission and values of the company, i.e. perceiving the company as being forward-looking and innovative and that it operates ethically, are all strong predictors of employee engagement. Specifically, these elements have been linked with a psychological willingness from employees to make greater personal investments toward organizational goals.

The Importance Of Productivity, Collaboration, And Connection To The Organization In This New Work Environment

In today's work environment, employee expectations continue to shift. It is expected that some of the virtual experiments through 2020 will soon become the norm as virtual offices and jobs become increasingly common. Indeed, remote working is already becoming more of the norm with 94% of surveyed organizations planning to increase long-distance virtual meetings as opposed to in-person meetings in the next 12 to 24 months. A case in point is an Australian Telco company, which announced that their call center representatives would continue to work from home permanently.⁸ Today, employees expect greater work flexibility and require organizations to support a variety of working styles with the right supporting technologies.⁹

As employees settle into their home offices, some companies have been pushing the needle to ensure their workforce remains as productive as possible, aiming to replicate their office setup. For example, an American investment firm recently asked its 45,000 employees to work remotely, but it gave its employees the choice to have another monitor delivered to their home address should they need it.¹⁰ Another example is an American health insurer that has developed five separate work style programs to accommodate various physical dependencies, one of which is fully remote.¹¹

HOW PRODUCTIVITY, COLLABORATION, AND CONNECTION TO THE ORGANIZATION CONTRIBUTE TO EX AND BUSINESS RESULTS

In light of this, understanding what drives strong EX, and how this relates to the workplace environment, is crucial to an organization's ability to adjust to this new social context of work. When considering the workplace environment, it is critical for organizations to account for the rise of remote working and extend their thinking to include the home office. It is also important to deepen their understanding of what constitutes that environment, from the technology made available to employees, to the policies and guidelines in place that support remote work. Indeed, this is supported by 72% of surveyed workplace environment professionals who have affirmed that building an optimal workplace environment, with the right technology and hardware, is crucial to delivering a good employee experience.



As a physical manifestation of the broader organization, the workplace environment serves both as a reflection and foundation for the employee experience of an organization.

Last year's commissioned study explored the attitude of users toward their monitors. It revealed that specific monitor features impact employees' perception of productivity, sense of care, and well-being.¹² This year's study broadens that conversation to include the employee experience as a whole, including the concept of the virtual workforce. By doing so, we found that organizations that have put effort into improving their workplace environment have also boosted their employee experience. This has led us to keep our focus on employees' productivity, which is a key contributor to great EX, and expand our research to include the notions of collaboration and connection to the organization. More specifically, we found that to successfully empower, enable, and inspire employees, organizations must focus on empowering employees to be productive, enabling them to be collaborative, and inspiring them by connecting them with organizational values:

- › **Empowering employees to be productive with technology, wherever they work from.** Whether it is in the office or from home, technology solutions and hardware form a crucial part of the workplace environment and are critical to facilitating employee productivity. Indeed, 71% of surveyed workplace environment professionals say that technology made available to employees is key to good EX and CX. This translates into business results as organizations that had invested in employee productivity solutions over the last 12 months saw an average 14% more in benefits in terms of cost savings or additional revenue than organizations that did not (see Figure 3). In addition, out of 11 workplace improvement initiatives, we found that investing in employee productivity solutions, such as widescreen/dual monitors, mobile devices, and more, was most strongly linked with improving employee productivity. Fifty-three percent of surveyed employers reported a direct link between that investment and higher employee productivity (see Figure 2).
- › **Enabling employees to collaborate, access, and share information easily.** The recent crisis has amplified the importance of technology in helping employees remain collaborative wherever they are working from. From an office environment perspective, our study found that the adoption or expansion of spaces, which are likely for collaboration and hot desking, were most strongly linked with driving cost reductions and improving employee knowledge sharing. Indeed, 64% of employers who had adopted or expanded collaboration spaces in the last 12 months (e.g. video conference meeting rooms, innovation labs, training rooms, etc.) have reduced or contained their annual costs (mainly from lower real-estate costs), while 57% have also observed enhanced employee collaboration. Regardless of other initiatives they may have undertaken, organizations that have invested into collaboration spaces are also seeing superior cost savings or additional revenue than organizations that did not, by 35% on average (see Figure 3). Following these two workplace improvement initiatives, employers also reported higher levels of employee engagement in comparison to those that did not invest in these initiatives.

“Organizations have the ability to make a big return on investment if they look at their workplace design as a business decision. Doing it right can transform their office from a place where people work to a powerful business tool supporting corporate goals.”

Karen Giunta, consultant, workplace interior design company



“A good workplace environment will enable and empower the employee by instilling within the employee a sense of control.”




Maria Lund Jensen, workplace services manager, medical technology company



› **Inspiring employees by building a work environment that facilitates a stronger connection to organizational values.** To deliver a good employee experience, it is critical for organizations to look at their workplace environment as an extension of their corporate brand. Fifty-five percent of surveyed employees say that what affects the quality of their EX is how well their companies' values are reflected in both the workplace and in the technology that is made available to them. Indeed, 62% of surveyed workplace environment professionals agree that workplace design choices improve an employee's perception of their employer. Beyond design, surveyed workplace environment professionals also indicated that how well an employee is able to maintain the privacy of their work will increase their trust in their organization and help them feel more confident at work (66%). Additionally, organizations which are committing to sustainable/environmentally friendly work policies/practices also experienced stronger brand connection from their employees (60%). Indeed, organizations are acting on this as 66% of surveyed employers plan to increase their investment into workplace environment improvements over the next 12 months. This is accentuated even further in the US (with 80% of employers). With the work environment extending to the home office, our study also found that increasing remote and mobile worker programs particularly strengthened an employee's connection to their organization. Indeed, when done well, with a formalized remote work program and the right supporting technology, implementing or increasing remote working is extremely powerful in strengthening an employee's connection to their organization. Sixty-two percent of surveyed employers reported a direct correlation, the highest of all the initiatives tested (see Figure 2). Increased remote work also brought higher employee engagement to 63% of surveyed employers and improved talent attraction to 57% of respondents (see Figure 2). This has generated benefits in terms of cost savings or additional revenue for these organizations. When implementing remote work into their overall workplace improvement initiatives, surveyed organizations reported benefits 50% higher, on average, in terms of cost savings or additional revenue than companies that did not (see Figure 3).

Figure 3

Three Key Workplace Improvement Initiatives Are Yielding More Benefits

	Additional benefits observed by organizations that have invested into the initiative in terms of cost savings or additional revenue vs those that haven't
 Investment in technology and hardware for employee productivity	+14%
 Adoption or expansion of spaces prone for collaboration	+35%
 Increase in remote and mobile workers	+50%

Base: 430 business decision makers and influencers involved in monitor/end user device purchasing and/or workplace design
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

The Role Of Monitors In Improving Employee Productivity, Collaboration, And Connection To The Organization

Our study shows that firms are struggling to adapt to the fast-changing nature of work, pushing them to rethink current technology priorities to ensure business resilience. Indeed, the fast-changing pace (50%) and lack of budget (53%) are reported as the two top challenges faced by employers when creating a better workplace environment.

Within this, Forrester's EX Index confirms the importance of technology made available to employees as a key enabler of employee engagement: "Technology usage and satisfaction both play a significant role in employee engagement. For information workers, technology is the main resource enabling them to be productive. When this technology works, it is good, but when it fails or even slows down it can lead to disengagement, and ultimately hinder engagement. Specifically, employees who scored in the top 20% of engagement in our survey are mostly satisfied with their technology environment, while those in the lowest 50% were most dissatisfied with their technology."¹³

SPECIFIC MONITOR FEATURES IMPACT EMPLOYEE PRODUCTIVITY, COLLABORATION, AND CONNECTION TO THE ORGANIZATION

Within technology solutions and hardware, monitors are a key enabler in a knowledge worker's day-to-day work, playing a significant role in creating an optimum work environment: 81% of surveyed employees say that monitors play a key role in their workplace environment (see Figure 4).

But there is room for improvement, as almost half of surveyed organizations (45%) continue to adopt a one-size-fits-all approach when purchasing monitors, with only 28% of surveyed employees completely satisfied with their current monitor setup. More specifically, last year's commissioned study found that specific monitor features (including ergonomics, the front-of-screen experience, and connectivity) all had an impact on an employee's experience. Specifically, last year's study found that poor ergonomics were not only detrimental to an employee's health but it also negatively impacted the perception they had of their company. It also identified that both the front-of-screen experience and connectivity of monitors impacted an employee's productivity.

To further understand the role monitors play in the employee experience, we've expanded this year's analysis to uncover the link between monitor features and employees' ability to feel productive, collaborative, and more connected to their organization. Based on these new elements, we focused our analysis on six key monitor features: ultrawide screens, color coverage, meeting room screens, design, sustainability, and privacy. The results of this analysis are explored in the following sections.



"Technology made available to employees in the workplace environment is really important. A lot of them work in global teams, they need to be able to collaborate and feel connected on projects."

Human factors engineer, biotech and medical company



"A lot of an employee's perception of their workspace is determined by their visual senses. Considering employees spend a lot of time on their monitors; it is definitely one of the most critical pieces of equipment available in the workplace."

Michael Collins, ergonomics consultant, standards body



Figure 4

“Please indicate how much you agree with the following statements.”

(Per respondents that selected “Agree” or “Strongly agree”)

	US	UK	Scandinavia	France	China	Japan	ANZ	Germany
Monitors play a key role in my workplace environment	75%	77%	82%	86%	87%	82%	66%	89%

Monitors play a key role in workplace environments across the world — particularly within Germany, China, and France.

Base: 800 knowledge workers using a computer and/or laptop and monitor to perform their work on a daily basis
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

Boost Productivity With Ultrawide Screens And Wider Color Coverage

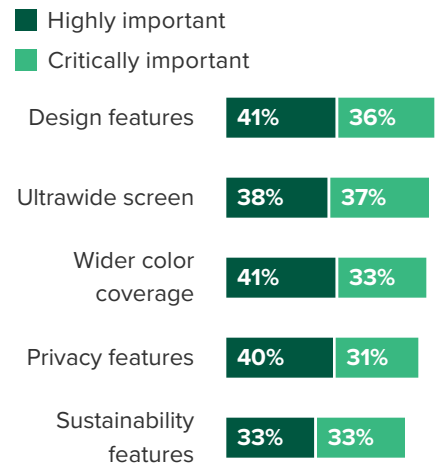
Last year’s study showed that monitor size and resolution, color accuracy, and blue-light emission levels were all important features to consider in improving workforce productivity. This year’s study highlights the role played by ultrawide screens and wider color coverage monitors in improving employee productivity in their day-to-day tasks, which ultimately influences their employee experience. Our analysis showed that:

- › **Ultrawide screens increase employee productivity.** Surveyed employees indicated that ultrawide monitors would improve their productivity by allowing them to perform tasks in a smarter and faster way (79%). This is confirmed by 76% of surveyed workplace environment professionals who indicated that ultrawide screens positively influenced productivity. Indeed, 66% of surveyed employees expressed a need to reduce the amount of switching they had to do between applications/windows at work. Another 75% expected ultrawide monitors would help them multitask better, allowing them to shift their focus to other value-add activities. Organizations are answering that need, with screen size being a top consideration in monitor purchase decisions for 64% of respondents, and 74% of them saying that an ultrawide screen is an important feature for an employee’s day-to-day work.
- › **Similarly, wider color coverage helps employees perform tasks more effectively.** Seventy-five percent of surveyed employees reported requiring precise color reproduction to conduct their day-to-day work. It also allowed them to be more efficient and work faster, with 71% of surveyed employees citing that wider color coverage improves productivity, and 65% reporting that having life-like color, enabled by wider color coverage monitors, helps in the design and consumption of creative content (e.g. website, advertising, etc.).



Figure 5

“How important are the following monitor features to help you be productive?”



Base: 800 knowledge workers using a computer and/or laptop and monitor to perform their work on a daily basis
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

- › **Insufficient screen size and poor color coverage negatively impacts employee productivity.** Only 23% of employees are completely satisfied with their monitor's screen size. When inadequate, it prevents them from multitasking efficiently, which negatively affects their day-to-day work. Employees' productivity also suffers from insufficient monitor color coverage with only 20% of knowledge workers being completely satisfied with that feature. For instance, 80% of employees say that wider color coverage will help them better prepare and read presentations, design products and components (69%), and design marketing collateral (69%). This represents an untapped opportunity for organizations to improve employee productivity, by providing their workforce with the right technology they need to perform at an optimum level.

“Wider screens would be more ergonomic and efficient for workers. A curved screen is important because it keeps the user's vision focused on the screen and helps reduce distractions around and about the office space. This is especially relevant in today's more open space working environments.”

Livia Czaholi, workplace services manager, professional services firm

Enable Faster And Smarter Collaboration With Enhanced Meeting Room Solutions

The expansion of remote working has emphasized the importance of collaboration in maintaining business continuity for many organizations. But while some employees will continue to work remotely, others will return to their office space, or they will adopt hybrid working styles. Indeed, for many, collaborating with team members and partners from other locations and geographies will be the new norm. This section explores the role of collaborative spaces and meeting room screens in enabling employee collaboration and ultimately improving the employee experience:

- › **Meeting room screens are key to easily collaborating, accessing, and sharing information.** Designing meeting rooms that are optimal for collaboration is a challenge for nearly half of employers (45%), with the majority of meeting rooms today equipped with a screen (62%) — albeit only half of those meetings rooms, as stated by interviewees, having interactive features. It is then not surprising to see that 88% of surveyed employees are not completely satisfied with their current meeting room setup. And in confirmation of that finding, 61% of surveyed workplace environment professionals say that traditional meeting room projectors or screens are falling short of enabling employees to collaborate, access, and share information easily. But we can expect to see progress, as 33% of surveyed organizations are looking at upgrading their current meeting room displays to large interactive touch displays with complementary peripherals in the next 12 to 24 months.



“Having a meeting room screen with advanced features (e.g. touch screen), allows for better collaboration and visualization, which are both key components when running meetings. It is a need in a global virtual workforce, where remote work and virtual teams are normalized.”

Divya Narayan, ergonomics consultant, medical network



- › **A wide variety of meeting room screen features improve employee collaboration.** Surveyed employees are selecting audio-visual functionality (e.g. camera, mic, speaker, etc.), as their most valued feature to effectively collaborate in meeting rooms (74%) (see Figure 6). This is also a top consideration for 71% of employers in their purchasing decisions. Similarly, organizations should consider touch-screen functionalities to help employees more actively interact and collaborate with a shared screen during a meeting. As 60% of surveyed workplace environment professionals cited touch-screen capabilities improving employee collaboration when using meeting room screens. Meeting room screens should also leverage wireless connectivity features to avoid time lost in looking for missing connectors/cables — this was the number one challenge cited by 50% of surveyed employees when using meeting room screens. At the forefront of future expenditure, workplace environment professionals recommend that organizations further invest in accessibility features for meeting rooms (66%).
- › **Suboptimal meeting rooms hinder employee collaboration.** Employees are frustrated with their poor experiences, and they do not feel fully engaged as meeting participants. Indeed, 71% of them say that suboptimal meeting room screens hinder their ability to collaborate with colleagues and partners. Similarly, half of them report difficulties with actively interacting and collaborating when screen-sharing during a meeting. Poor collaborative capabilities result in frustration and lost time.

“Whiteboard and touch-screen functionality on meeting room screens are great. It enables users to go ‘off-piste,’ to be more creative, collaborate better, and ultimately be more productive.”

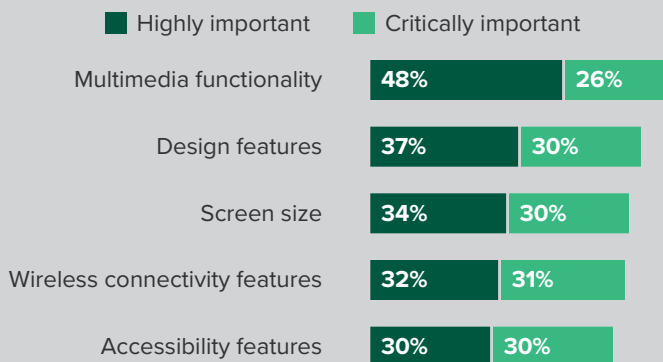
Mark Edwards, human factors consultant, engineering and management consultancy



Figure 6

“How important are the following meeting room monitor features to help you collaborate with colleagues, partners, and clients?”

(Displaying top five answers)



Base: 800 knowledge workers using a computer and/or laptop and monitor to perform their work on a daily basis

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

Above all else, meeting room screen multimedia functionality is crucial to enabling collaboration.

Leverage Design, Privacy, And Sustainability Features For A Stronger Connection With Your Employees



Out of the 11 workplace improvement initiatives tested, our study found that supporting remote working had the highest impact on an employee's connection to their organization. Additional factors include supporting an employee's effort to protect the environment, respecting individual privacy, and helping enable a sense of embracing new ideas also helped in building trust and strengthening that connection:

- > **High consideration for design features by employers enhances the overall workplace and strengthens employees' connection to the organization.** A monitor's design most strongly influences an employee's connection to their organization's brand and values (with a correlation of 70%). And organizations are prioritizing this. When purchasing monitors, the design of the monitor is the key feature being considered by employers (73%); it is more important than any other feature including screen size (64%). More specifically, employers are considering monitors that provide easy access to ports (71%), a narrow bezel (67%), and a thin and lightweight design (63%). This will resonate with employees who consider a professional/modern aesthetic as a strong/critical preference in relation to their workplace monitors (59%). Sixty-one percent of them also say that monitor design features enhance their workplace overall, enabling a sense of embracing new ideas and a stronger connection to their organization's values (see Figure 7).

"A monitor's bezel affects an employee's impression of how big their monitor is. Thin bezeled monitors feel like an upgrade, but [they] also enable additional maneuverability/flexibility because they take up less desk real estate."

Michael Collins, ergonomics consultant, standards body



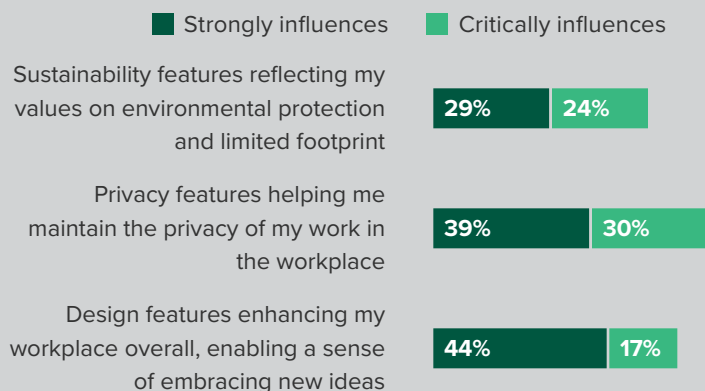
"When purchasing monitors, organizations should strive to find the eco-friendliest asset within their budget."

Divya Narayan, ergonomics consultant, medical network



Figure 7

"How are the below monitor features influencing your connection to your organization's values?"



Base: 800 knowledge workers using a computer and/or laptop and monitor to perform their work on a daily basis
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

Privacy features, in particular, should not be overlooked in how they influence the connectedness an employee feels to their organization's values.

- › **The sustainability features of monitors are a reflection of company values.** An organization's societal impact has direct consequences on their ability to attract talent; millennials, in particular, are making employment decisions based on corporate values, with "purpose over paycheck."¹⁴ Our study shows that this perception includes the technology made available to employees to perform their day-to-day work: Sustainability features (e.g. power consumption, eco-friendly material, environmental certification, etc.) have a strong correlation with an employee's connection to their organization's brand and values (67%). But only 56% of employers are aware that monitor sustainability features reflect the company's values, and only 58% consider limiting the environmental impact as an important requirement when designing a workplace environment. One potential explanation is that most IT teams (46%) do not play a large role in corporate social responsibility (CSR) and sustainability corporate programs. This is creating a disconnect between how employees feel about sustainability and what their organizations do and show them. Indeed, 46% of surveyed employees do not feel connected to the core mission and values of their organization, rather, they actively think about ways to be more sustainable/environmentally friendly at work (65%). Workplace environment professionals are also observing the growing importance of sustainability practices within the workplace environment, with 64% of them saying that monitor sustainability features are increasingly important. Organizations must look at the sustainability components of their hardware purchases, including monitors. Doing so will lead to a stronger connection between employees and organizational values, as 58% of employees feel prouder to work when they know their firm uses more environmentally sustainable products. Specifically, organizations should pay close attention to, and communicate on, their carbon footprint when purchasing monitors, as this is the top sustainability feature (65%) considered by their employees.
- › **Neglecting monitor privacy features damages employees' connection to the organization.** Employers are failing to address the privacy needs of employees working remotely or in an open space: Half of surveyed employees know someone who has been a victim of visual-hacking¹⁵, and 55% are concerned that the information they are viewing on their screen is at risk of being compromised. Only 57% of employers consider privacy features as highly/critically important when purchasing monitors, resulting in only 16% of employees being completely satisfied with their monitor's privacy features.

"Privacy features allow employees to feel more comfortable and trustworthy in an area."

Amgad Labib, workplace design strategist, office furniture manufacturer

COUNTRY SNAPSHOT: KEY INSIGHTS

<p>US</p> 	<ul style="list-style-type: none">• The US is the region surveyed with the highest level of awareness about the importance of EX in driving business results, with 74% of companies considering it important to driving good CX, and 80% planning to increase investments to improve their workplace environment in the next 12 months. As a result, this is also the country with the highest number of employees reporting feeling empowered to be productive (74%) and enabled to collaborate (74%).• However, this needs to be embedded into technology purchasing decision making, as 88% of organizations believe they are providing their employees with technology that helps them be productive, but 66% are still adopting a one-size-fits-all approach when purchasing monitors. American companies should identify and source the right types of monitors and features for specific employee groups to improve EX.
<p>UK</p> 	<ul style="list-style-type: none">• Design features are the top monitor feature considered by British organizations when investing in monitors (84%), with 72% of respondents reporting that it helps them attract and retain talent. However, only 50% of surveyed UK employees feel connected to their organizations' core mission and values, and only 58% are currently satisfied with their current monitor design features — the feature with the strongest correlation with connection to their organization.• In addition, only 28% of organizations provide office-based employees with a dual-monitor setup (the lowest of all regions surveyed after Japan), and only 26% provide employees with ultrawide monitors. To strengthen employees' connection to their organizations, British companies should expand their purchasing decision criteria beyond technical features and also consider the emotional impact of the technology they provide their employees.
<p>Scandinavia</p> 	<ul style="list-style-type: none">• This is the region with the most employees feeling empowered to be productive and get their work done (73%). A large number of employees also perceive their organization as being innovative and forward-looking (71%). However, employers in this region need to be more aware of the role of privacy in the employee experience, as 46% believe that privacy features offered by monitors are not important for an employee's daily work.• More efficient collaboration from their monitors is the key benefit expected by Scandinavian employees (80%), unlike other regions which rank multitasking as the top benefit.
<p>France</p> 	<ul style="list-style-type: none">• Showing a high maturity level, 90% of French companies believe that the technology made available to employees is key for good employee and customer experiences. This level of awareness translates into their purchase decisions, as this is the only region which ranks sustainability features as the top monitor feature considered by organizations when purchasing monitors (74%). Our study demonstrated that corporate considerations around sustainability practices are strongly improving the connection that employees feel toward their company, with 55% of the surveyed French respondents feeling connected to the core mission and value of their organization, which is amongst the highest scores of all the surveyed regions.• However, French organizations should not neglect other monitor features in their purchasing process, as for instance only 27% of their employees are currently completely satisfied with the screen size of their monitor.
<p>China</p> 	<ul style="list-style-type: none">• Only 50% of Chinese organizations believe that EX is important in driving good CX. As a result, 45% of employees are saying that their organization does not provide them with the technology they need to be productive and get their work done (e.g. 69% of Chinese employees are dissatisfied with their monitors' color coverage, and 50% are dissatisfied with their monitors' screen size).• Companies in China must rethink how they purchase monitors by placing their employees' needs and wants at the center of their decision process to optimize the employee experience and drive business results.

Japan



- Lack of budget and prioritization against other initiatives is the key challenge for Japanese companies in creating a better workplace environment (84%). This results in **Japanese employees being the most dissatisfied with their current monitor setup** (83%), as nearly half of Japanese respondents do not feel empowered to be productive and get their work done (48%).
- **It is urgent for Japanese organizations to improve their employee experience by reassessing the technology and tools they provide to their employees** and prioritizing investments that empower, enable, and inspire their employees.

ANZ



- Providing optimum technology and connectivity for employee productivity is the top requirement for Australian organizations when designing workplace environments (80%). However, **only 46% of them, the lowest across surveyed regions, are considering the voice of their employee in hardware and device investments**. This results in 81% of employees being not completely satisfied with their current monitor setup, and 71% expecting their monitors to help them multitask better to realize gains in productivity.
- Australian organizations have the right focus on employee productivity, but **they must learn how to operationalize it in their purchase decisions**; for instance, by identifying the employee groups that would benefit from monitors with wider color coverage or ultrawide screens to perform tasks more effectively.

Germany



- German companies are showing high consideration for employee collaboration and for creating a sustainable work environment. Indeed, facilitating collaboration is a key consideration for 80% of German organizations, and 70% are considering their impact on the environment as an important requirement when designing a workplace environment.
- When it comes to monitors, 89% of German employees say they require precise color reproduction to conduct their work (the highest across all surveyed regions). However, **there is still 36% of German organizations that do not consider precise color reproduction in their monitor purchase decisions**. To improve employee productivity and the employee experience, **German companies must consider the whole spectrum of monitor features, and tailor their approach to selecting monitors for specific employee needs**.

COMPANY SIZE SNAPSHOT: KEY INSIGHTS¹⁶

Medium-sized companies



- **Medium-sized companies are more aware than their larger counterparts that EX impacts their bottom line** (64%), however, they are falling behind when it comes to delivering great employee experiences (EX), with 67% saying that they still need to improve it.
- More particularly, medium-sized companies are **struggling to empower and enable their employees with the right technology and tools**. Sixty percent of their employees are dissatisfied with the collaborative technology and tools made available to them, and 39% are dissatisfied with their productivity tools. Furthermore, they lack visibility here, as only 19% measure employees' satisfaction with technology and tools.
- Specifically, for monitors, medium-sized companies are the ones that least frequently upgrade their employees' monitors (44% report upgrading monitors once every 3 to 5 years).
- During their monitor purchasing process, these organizations prioritized design features (71%), screen size (64%) and sustainability features (64%) as the key monitor features informing their decision.
- Another 40% also say that their **employees do not feel like their workplace is an accurate reflection of their corporate values**, nor do they consider their company as being innovative and forward-looking (45%), hindering a stronger connection to the organization.
- Looking toward the next 12 months, our study found that there are other forces at play preventing medium-sized companies from investing in workplace improvement initiatives and improved EX, specifically, budget (75%). However, we expect to see some progress in this space, as 64% of the respondents are **planning to increase their investments to improve EX in the next year**. For that, they must take a holistic view, looking at how the work office has expanded to the home office, clearly defining the results they want to achieve and their associated metrics, and involving their employees in their design and decision processes.

Commercial businesses



- Sixty-five percent of surveyed commercial businesses are aware that good EX is important in driving good CX. Despite that, budget remains a key impediment to workplace improvement initiatives leading to better EX (67%).
- Not sufficiently prioritizing investments in EX negatively impacts employees' productivity and ability to collaborate. Indeed, commercial business employees are dissatisfied with the productivity technology and tools made available to them (32%), as well as with their collaborative technology and tools (30%). For instance, when it comes to performing a regular technology refresh, surveyed commercial businesses mostly upgrade their employees' monitors once every 3 to 5 years (33%), with some of them upgrading more frequently (22% reported upgrading once every two years).
- When purchasing monitors, commercial businesses primarily look at design features (72%), followed by screen size (66%), and sustainability features (63%).
- We also expect commercial businesses to continue to shift their focus toward improving EX with 67% of respondents planning to increase investments to improve their workplace environment overall in the next 12 months.
- To build the business case for these investments, commercial businesses must start by defining metrics and KPIs that monitor the quality of their EX (currently, only 24% of them are measuring employees' satisfaction with technology and tools). They should also gather insights from their employees and identify pain points. For instance, quantifying the time lost in productivity when switching between windows, due to a small screen display, will help support specific technology investments.

Large enterprises



- **Large enterprises are heavily increasing their investments to support remote and mobile workers (42%),** the initiative most linked with an employee's connection to their organization.
- They are also the ones that least struggled with empowering and enabling their employees with the right tools, with 77% of surveyed employees being satisfied with the productivity technology and tools made available to them, and 77% being satisfied with the collaborative technology and tools made available to them (versus only 61% and 40%, respectively, in medium-sized companies).
- Indeed, 46% of surveyed enterprises tracked employee technology/tool satisfaction, allowing them to plan and adjust based on the voice of the employees. Another 85% say that suboptimal monitors particularly hinder employees' experiences, and **76% believe that monitor design plays a key role in their overall workplace environment.** In line with that, enterprises most frequently upgrade their employees' monitors with 21% upgrading as often as they can to keep up with the latest technology.
- Enterprises are also looking at monitor color coverage differently than smaller organizations, with 83% of them considering it an important feature when purchasing monitors (versus only 43% of medium-sized companies and 50% of commercial businesses). The other top feature being considered by these organizations are design features (74%) and screen size (62%).
- Over the next 12 to 24 months, enterprises are planning to invest more into the adoption and expansion of hot desking (57%), with **further investments scattered across a variety of initiatives including technology and hardware for employee productivity (50%) and collaboration (48%).**
- While continuing to empower their employees with the right tools to both be productive and to easily collaborate, enterprises should also leverage technology made available to employees to strengthen their connection with their organization, as one-third of their employees do not perceive their organization to be innovative or forward-looking.

Key Recommendations

A company's technology infrastructure dictates what employees can do in delivering customer experiences. As companies enable innovation in their employees' working environments, albeit either in the home or in the office, they will need IT and business leaders to properly mold their EX with the right technology investments. A well-thought-out monitor strategy is crucial for empowering, enabling, and inspiring employees in their day-to-day work. Forrester's in-depth survey of employers, employees, and workplace environment professionals about EX drivers and benefits, and the role of workplace environment (including technology and monitors), yielded several important recommendations:



Prepare to permanently support a virtual workforce. Businesses have been forced into an unprecedented experiment with remote work and bans on business travel. Firms are not expected to ever return to the normal they once knew, as employees settle into home working and mobile flexibility options, questioning the very necessity of air travel and in-person meetings. Business executives, who've experienced first hand the shortcomings of legacy technology environments, will demand that IT accelerate roadmaps for infrastructure modernization. This will include treating employees' home offices as an extension of their in-office desks, replicating as much as possible across the two environments.



Identify workplace needs and emerging employee behaviors. Many companies assume they know how work gets done. The reality is almost always more complicated. Use CX principles to improve your employee understanding. Interview and observe employees in their natural work environment to gather insights into their work preferences and how they complete their most important tasks. Start by assessing your employees' current usage patterns to identify key technology requirements and expectations in areas like monitor size and resolution, multimedia functionalities, and design features.



Focus on providing the right tools to enable good EX. Disruption has only amplified the importance of technology in helping employees remain productive, connected, and engaged. This study found that monitors are key enablers for strong EX, in an office space and at home. If your organization experienced first hand the shortcomings of legacy monitors, demand accelerated roadmaps for monitor replacement and workplace modernization.



Determine which specific monitor features to prioritize. Many organizations adopt a one-size-fits-all approach when purchasing monitors. This has a negative impact on EX. As monitor technology continues to advance, and employee expectations continue to rise, assess how monitor features ensure employees' ongoing productivity, collaboration, and connection to the organization. Uncover how features like ultrawide screens, color coverage, meeting room screens, design, sustainability, and privacy impact an employee's productivity, collaboration, and connection to their organization.



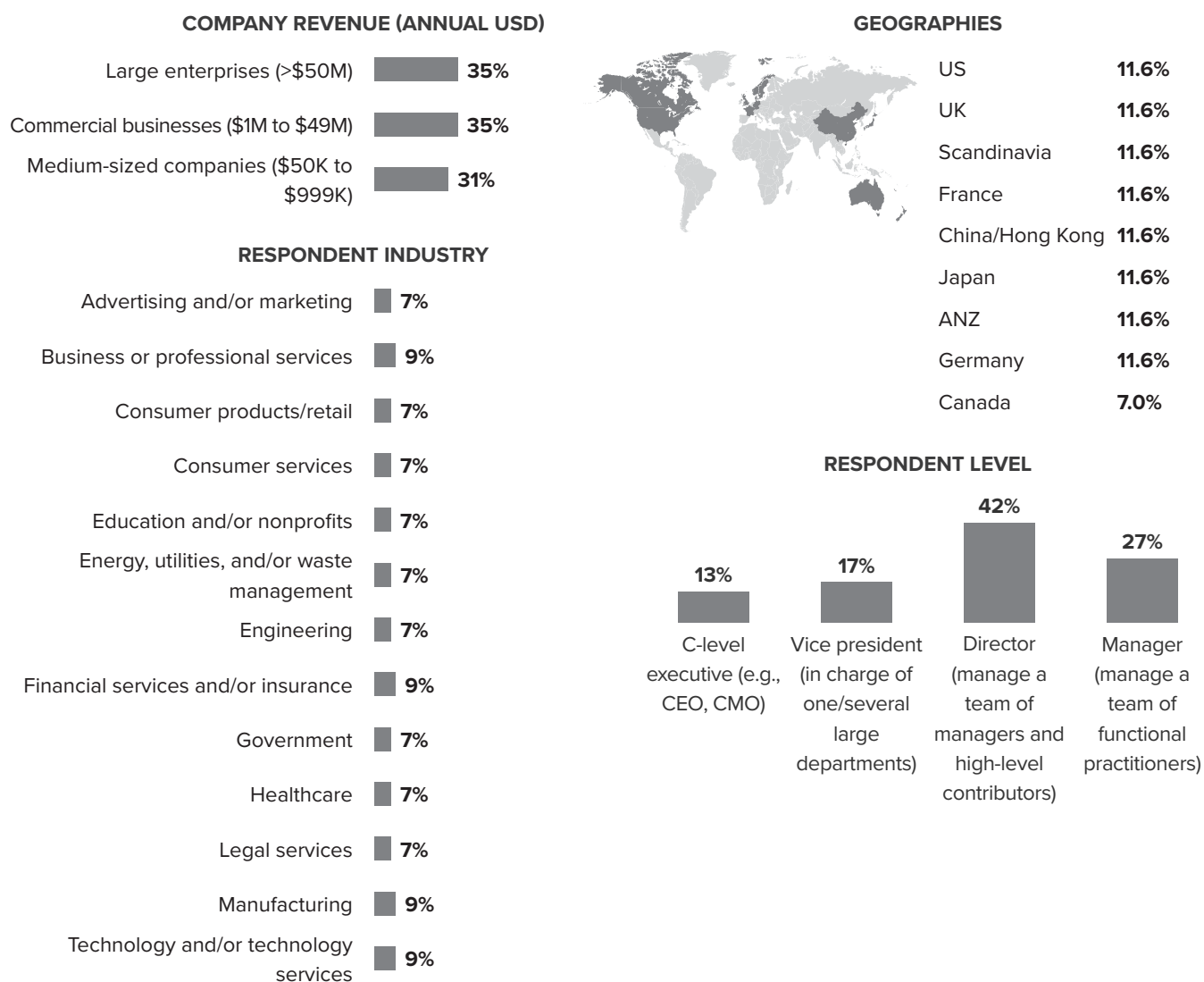
Insist that monitor purchase decisions explain how top features are addressed. This will force IT and business leaders to ground their choices in actual employee understanding. Evaluate each purchase decision on three factors: 1) how many of the critical EX factors it addresses; 2) how clearly it demonstrates its ability to improve performance on them; and 3) how much it will cost.

Appendix A: Methodology

In this study, Forrester surveyed: 430 business decision makers and influencers involved in monitor/end user device purchasing and/or workplace design; 800 knowledge workers that used a computer and/or laptop and monitor to perform their work on a daily basis; and 150 professionals that could speak to employee productivity, workplace environment, employee working styles, and well-being. Forrester also interviewed 10 business decision makers and influencers that are involved in monitor/end user device purchasing and/or workplace design. Respondents were surveyed across a range of industries and countries to evaluate the role of monitors and meeting room screens in the workplace environment and employee experience. Questions provided to the participants asked questions around their view of EX, the workplace environment, and specific monitor/meeting room screen features. The study began in November 2019 and was completed in May 2020.

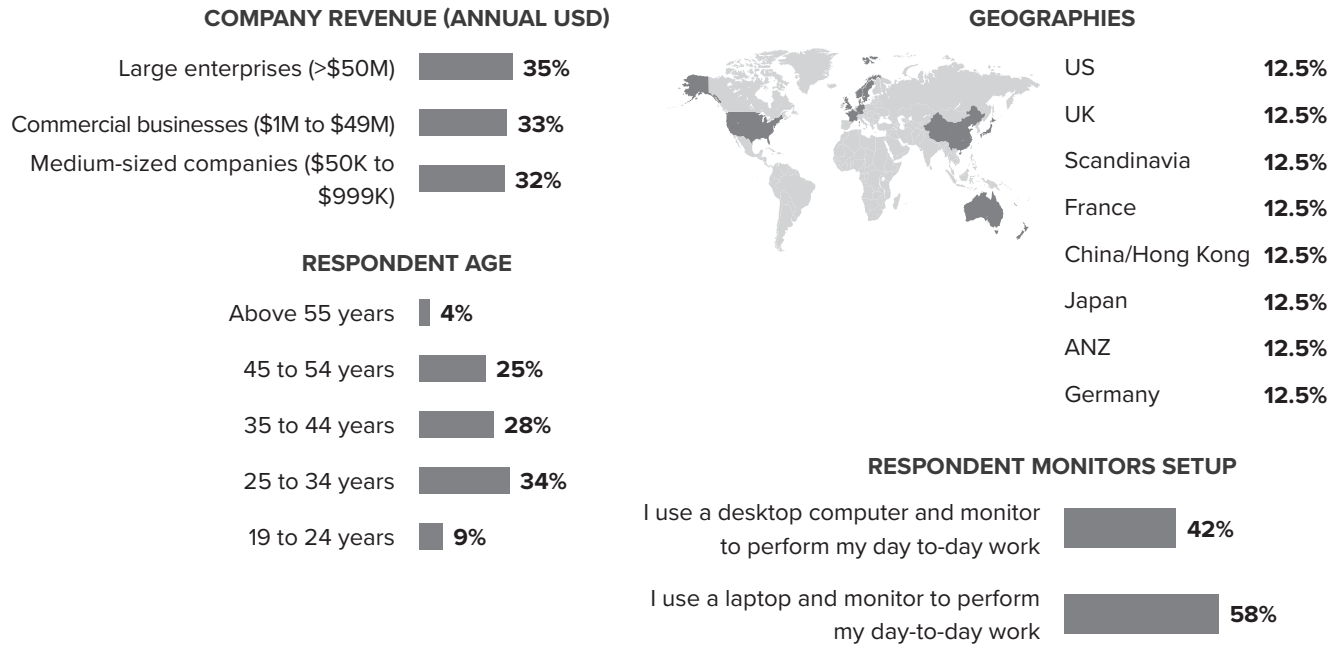
Appendix B: Firmographics And Demographics

Employers:



Base: 430 business decision makers and influencers involved in monitor/end user device purchasing and/or workplace design
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

Employees:



Base: 800 knowledge workers using a computer and/or laptop and monitor to perform their work on a daily basis
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

Workplace environment professionals:



Base: 150 professionals that can speak to employee productivity, workplace environment, employee working styles and well-being.
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell Technologies, March 2020

Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

“Introducing Forrester’s Employee Experience Index”, Forrester Research Inc., June 21, 2019

Appendix D: Endnotes

- ¹ An employee's perception of how well the organization's environment, culture, tools, and support structures keep them satisfied and engaged in their work and allow them to achieve and exceed their goals.
- ² For the purpose of this research, we will be defining the workplace environment as, "The tangible workplace environment that comprise(s) spatial layout and functionality of (its) surroundings." Source: Gabriel, Justin & Asawo, Soye. (2017). Physical workplace environment and employee engagement: A theoretical exploration by Madu, N. G., Asawo, S. P. and Gabriel, J.M.O.. International Journal of Arts and Humanity. 1. 867-884 (https://www.researchgate.net/publication/321361940_Physical_workplace_environment_and_employee_engagement_A_theoretical_exploration_by_Madu_N_G_Asawo_S_P_and_Gabriel_JMO).
- ³ Source: "Elevate Employee Productivity By Choosing The Right Display Monitors," a commissioned study conducted by Forrester Consulting on behalf of Dell, April 2018.
- ⁴ Source: "Exploring The Role Of Monitors In Improving Employee Experience," a commissioned study conducted by Forrester Consulting on behalf of Dell, July 2019.
- ⁵ Source: Kristine Dery, Ina M. Sebastian, "Building Business Value With Employee Experience," MIT Center For Information Systems Research, June 15, 2017 (<https://www.avanade.com/-/media/asset/thinking/mit-research.pdf>).
- ⁶ Source: "The Realities Of Remote Work: An Update From Forrester's PandemicEX Survey," Forrester (<https://www.forrester.com/fn/34sA4OrA6oztwMe136eEwv>).
- ⁷ Forrester's Employee Experience Index starts with what an engaged, energized employee looks like and works backward to identify which factors are either helping or hurting that employee's energy. It is inspired by organizational behavior research and backed by more than 30 years of peer-reviewed scientific inquiry, as well as by Forrester's own research to identify the indicators of employee engagement, burnout, motivation, creativity, productivity, and technology and how they relate to outcomes for both employees and the business, such as customer experience. The analysis is based on a detailed survey of 13,800 information workers in seven countries. We also worked with vendors and practitioners to validate our approach. The results provide a clear understanding of the factors that most affect EX and how they relate to business outcomes, such as customer experience. Source: "Introducing Forrester's Employee Experience Index," Forrester Research, Inc., February 14, 2019.
- ⁸ Source: James Fernyhough, "Optus staff to work from home permanently," The Australian Financial Review, April 17, 2020 (<https://www.afr.com/companies/telecommunications/optus-staff-to-work-from-home-permanently-20200417-p54kro>).
- ⁹ Source: "Follow Four Imperatives To Improve The Remote Worker Experience," Forrester Research, Inc., May 9, 2018.
- ¹⁰ Source: "The Realities Of Remote Work: An Update From Forrester's PandemicEX Survey," Forrester (<https://www.forrester.com/fn/34sA4OrA6oztwMe136eEwv>).
- ¹¹ Source: "Inspiring Health & Well-being: 2018 Corporate Social Responsibility Report," Humana Inc. (<https://humana.gcs-web.com/static-files/8cca0550-967c-4e42-ac0a-83adf2cfabf1>).
- ¹² Source: Source: "Exploring The Role Of Monitors In Improving Employee Experience," a commissioned study conducted by Forrester Consulting on behalf of Dell, July 2019.
- ¹³ Source: "Forrester's EX Index: A Deeper Look At The Data," Forrester Research, Inc., March 4, 2020.
- ¹⁴ Source: "Adapt To Climate Change Or Face Extinction," Forrester Research, Inc., October 5, 2018.
- ¹⁵ Visual hacking is the act of physically spying what is on another's computer screen/desk.
- ¹⁶ Medium-sized companies refer to companies having between US\$50K and \$1M of annual revenue. Commercial businesses refers to companies having between US\$1M and \$50M of annual revenue. Large enterprises refer to companies having at least US\$50M of annual revenue.