DRIVE CHANGE FROM WITHIN

Gear your workplace for more

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Contents

Foreword

Rajesh Varrier,

SVP and Head of Microsoft Business at Infosys

The workforce in the digital era is a different beast. With millennials forming a majority of the workforce today, the "how, why, and where" of work has changed. And these new ways of working are demanding a change in the workplace too! The modern workplace needs to provide consumer-like experiences with ironclad security. It needs to enable instant, on-the-go, and seamless access to data and resources as people need to get their job done, efficiently. The new generation workforce is unwilling to sacrifice their potential at the altar of legacy systems. The battle cry for a more productive workplace has been sounded – it's time to transform or perish!

However, while change is inevitable, and underway – there are several ways organizations are looking at workplace transformation. Priorities, expectations, challenges, and approaches vary across industries and geographies and so does the preference for tools, technologies and external partners. To understand the drivers of, and strategies for workplace transformation, Infosys spoke to 1300+ business leaders across geographies and industries. The findings are quite interesting and showcase some common themes running across the board. The report clearly outlines the drivers of tomorrow's workplace and how organizations are adopting tools and technologies and are engaging with external partners to stay ahead of the game.

For Infosys, this study is a guide to our customers' motivations and priorities around workplace transformation. These insights will help us better understand the market trends and gaps, and how we can refine our capabilities to serve our customers better. Based on the findings, we have already put in place frameworks and solutions that will make the workplace transformation journey easier and more fruitful for our clients.

I am sure you'll find this an interesting read.

Get ready to navigate the next!

Introduction

Enterprise success and growth are often associated with external factors like competitive landscape, market dynamics, and customer expectations. However, recent research by Infosys shows that internal factors play an important role in the growth.[1]

To further examine how a company's workplace affects its growth, Infosys surveyed more than 1,300 senior leaders from banking, healthcare, manufacturing, retail, telecom, and energy and utility firms, with revenues of more than $1 billion. These business leaders represent some of the leading organizations operating across the United States, the United Kingdom, Europe, and Australia–New Zealand (ANZ). See Figure 1 for respondent demographics.

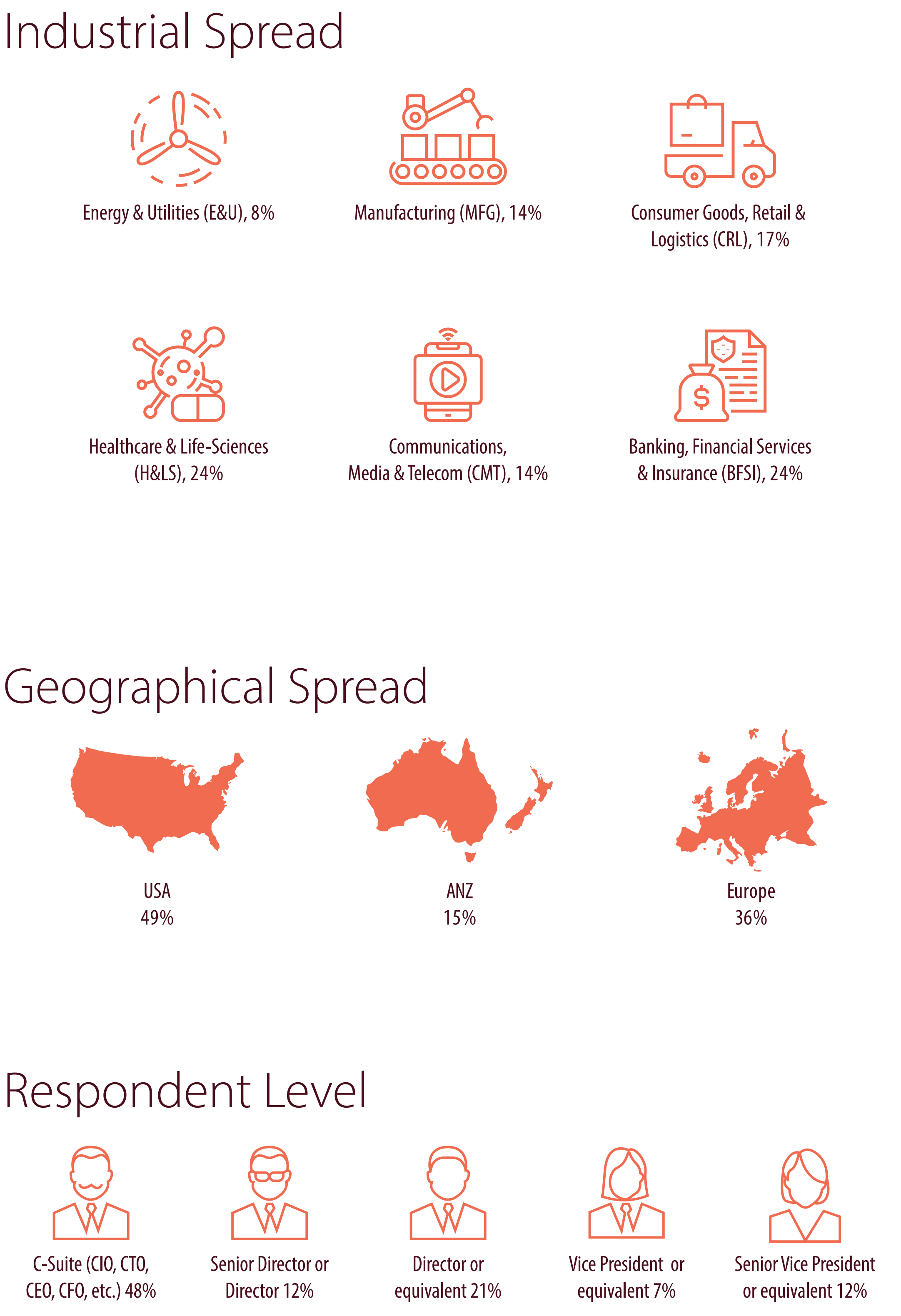
This report gathers perspectives on workplace transformation trends, adoption of various contemporary tools, transformation benefits, and apprehensions with respect to change across organizations. The data in this report are from an anonymous survey conducted between October and November 2019.

"We are at the cusp of a revolution – triggered by a generational shift converging with the consumerization of technology. Cutting edge digital technologies in the consumer arena are finding their way to the workplace with millennials. The way people work, and in fact 'why' they work has changed. And enterprises are left with no choice but to embrace and enable these new ways of working. Workplace transformation is inevitable. The question is, how will you go about it?"

Sanchit Mullick,

AVP, Head-Infosys Digital Workplace Services

Figure 1. Survey coverage



Source: Infosys

Executive Summary

The concept of looking within to unlock your truth has been around for ages. Yet, when it comes to business, this philosophy is seldom implemented. While the influence of external factors cannot be ignored, it is crucial, for organizations to realize that internal factors play an equally, if not more, important role in driving their growth. Workplace transformation must become a priority for business leaders in the world of changing workforce demographics;[2] evolving technologies; and the emergence of new, collaborative ways of working.[3]

At Infosys, we believe that **workplace transformation is essential to company growth. The four tenets of workplace transformation are adopting a digital mindset, creating an environment conducive for innovation, fostering collaboration, and being nimble in the face of workforce megatrends.**

To highlight the need to Drive Change From Within, we spoke to more than 1,300 business leaders across geographies and industries about their understanding, priorities, and challenges around workplace transformation. We found that,

Workplace transformation is a CEO priority. CEOs are the most influential in driving an organization to embark on a workplace transformation roadmap (45%) and contributing to the development of a workplace transformation roadmap (63%).

Collaboration and experience are the key drivers of adoption. An Infosys report, Talent Radar 2019, found that in the modern workplace, collaborative skills are more valued than individual skills.[4] To this end, CXOs strongly believe that workplace transformation can enhance collaboration across teams (86%) and also provide superior customer experience (84%).

Adoption is well underway, with companies making headway in their strategic roadmap. More than 80% of organizations already have a well-defined workplace transformation strategy in place.

Choosing the right solutions, data security, and organizational buy-in are key concerns. Fifty-five percent of respondents said that their major concern before embarking on workplace transformation was being able to choose the right solutions/technology. Ranking even higher, as concerns were implementation, concerns around data security (77%), and obtaining buy-in from across the organization (74%).

Digital remains the key pillar of transformation. A majority of the organizations surveyed perceive digital transformation elements (57%) to have the maximum impact on workplace transformation, as opposed to physical (38%) and cultural (15%) transformation elements.

External partners have a role to play in different stages of adoption. Organizations prefer engaging an external service provider while implementing the technology aspect of workplace transformation to help align solutions to the company/business outlook (60%) and also help them leverage the latest technologies (55%).

Measuring success. Organizations use Net Promoter Score (NPS) (45%), cost reduction (44%), and operational efficiency (44%) as the top metrics to measure success. Improvements in employee productivity (75%) and employee experience (88%) are stated as visible outcomes.

** Some of the percentages have been rounded off.*

The Social Workplace

Infosys worked with a major mining company[5] that had a 40,000 strong, diverse global workforce. They were looking at exponentially improving the way employees, suppliers, and vendors connected and worked. They saw a 'lack of collaboration' as a wasted potential that could bring in productivity and efficiency gains. And so, they invested in a next-gen workforce collaboration platform, which is set to improve productivity by an estimated 20% to 25%.

Similarly, IT solutions also helped improve employee productivity for a leading insurer.[6] Compliance issues were preventing their field force from storing customer data on mobile devices, leading to delays in processing. In addition, desktop/laptop applications increased infrastructure, operations and maintenance costs while resulting in delays due to IT downtime. To resolve these productivity roadblocks, they invested in next-gen solutions that would make their employees' jobs easier, deliver a better experience, and also bring down costs.

Whether by connecting a global workforce or enabling anytime-anywhere information access for people to perform better, every industry is undergoing a massive shift in workforce dynamics. Today's digital-native, boundary-less workforce is driving the transformation towards newer ways of working. And while the hype about Bring Your Own Device (BYOD), remote working, and flexible schedules has grown, that's not all there is to workplace transformation. See Figure 2 to understand what workplace transformation means to various stakeholders.

"A modern workplace needs to harness human potential and augment it with the right digital technologies."

Vijaya Bhaaratha Reddy Edla,

Delivery Manager, Infosys Digital Workplace Services

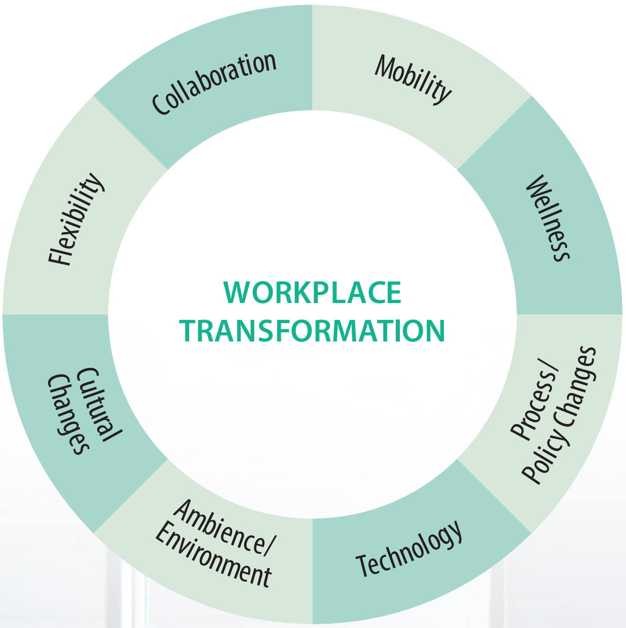
Imperatives for a collaborative workplace

Workplace transformation priorities must focus on a few key factors.

1. How does it make collaboration more contextual and intelligent?
2. How does it move the dot from employee engagement to employee experience?
3. How does it help achieve collective goals with dynamic teams?

Source: https://www.infosys.com/insights/ai-automation/disrupting-the-workplace-with-technology.html

Figure 2. Key aspects associated with workplace transformation



Source: Infosys

A shift in mindsets and priorities has brought employee engagement and experience in sharp focus. Keeping millennials engaged at work has become the top organizational challenge in the 21st century. A Gallup report found that 85% of employees are not engaged or actively disengaged at work, resulting in $7 trillion in lost productivity.[7] At the same time, ensuring workforce productivity has become a factor of personalization and technology interventions. A recent study found that 77% of employees report greater productivity while working off-site[8], and that having technology help them do their jobs effectively, improves work satisfaction for 92% of employees.[9]

These new developments call for a shift in the way organizations perceive the workplace. The modern workplace needs to enable human potential and augment it with supporting technologies to help employees freely share ideas, learn new skills, and explore emerging concepts. This allows them to go beyond pre-defined key responsibility areas (KRAs), think ingeniously, and deliver better business results.

Understandably, the days of a siloed, fragmented, and traditional workplaces with rigid structures, are history. As our research highlights, the modern workplace must morph around three key aspects – digital, physical, and cultural transformation - interlinked with each other.

Effective workplace transformation creates an environment where employees can contribute their best towards achieving a common objective. The key question for organizations is, how they can enable their employees to navigate the next, 'in environments where they thrive, not just as individuals, but as a purposeful network of teams.'[10] Creating social workplaces is an iterative process, and organizations must constantly monitor the impact of transformation initiatives and accordingly optimize their strategy.

More Value From The Workplace, Faster

The needs of the employee in the digital age have changed. Digital nomads - people working in global, remote teams on projects, require anytime-anywhere information and support access. The work itself is more digital, real-time, and increasingly integrated with the gig economy.[11] Traditional workplace models are evolving to adapt to this new reality. Studies show[12] that modern workplaces that embrace new ways of working and attune themselves to the changing needs of the new-age workforce are more productive, generate more revenue per employee, have higher customer satisfaction levels, and have low attrition.

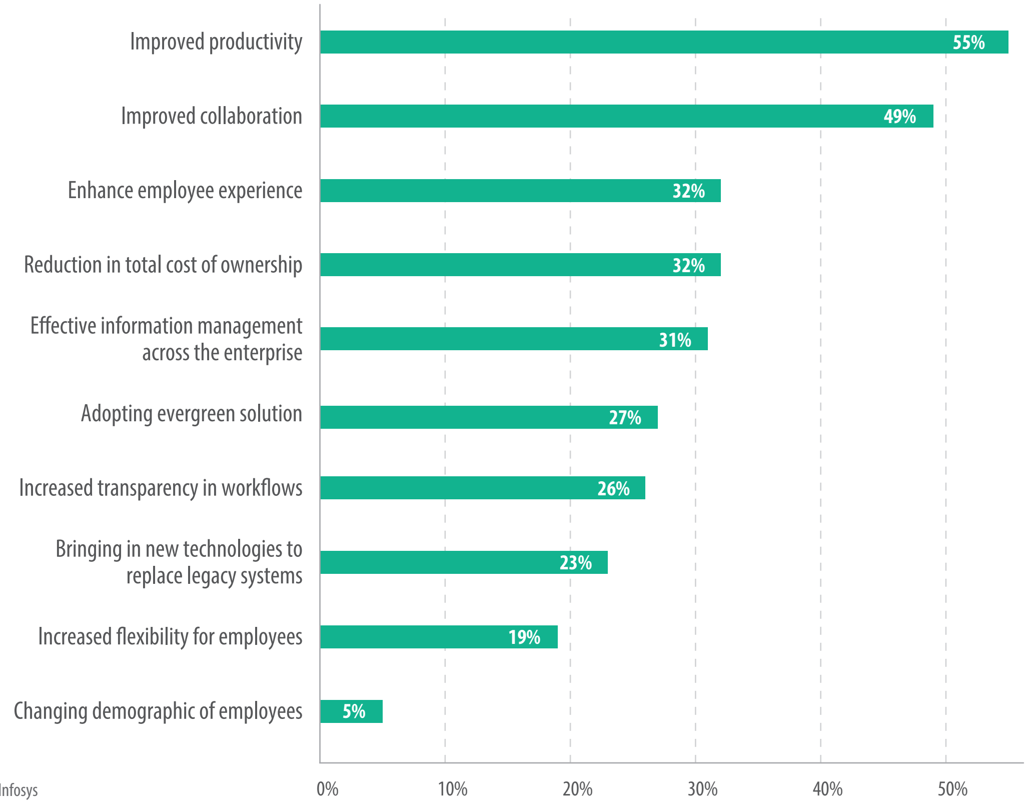
Organizations strongly believe that workplace transformation can improve collaboration across teams (86%) and also provide superior customer experience (84%). Some of the other benefits of workplace transformation include higher levels of employee productivity (84%) and improved employee experience (83%). Improved productivity (55%) and collaboration (49%) are also important considerations in choosing workplace transformation solutions/technologies. See Figures 3 and 4.

"The key question for organizations is how they can enable their employees to, be more, and do more in environments where they thrive, not just as individuals, but as a purposeful network of teams."

Madhu Sudhan R,

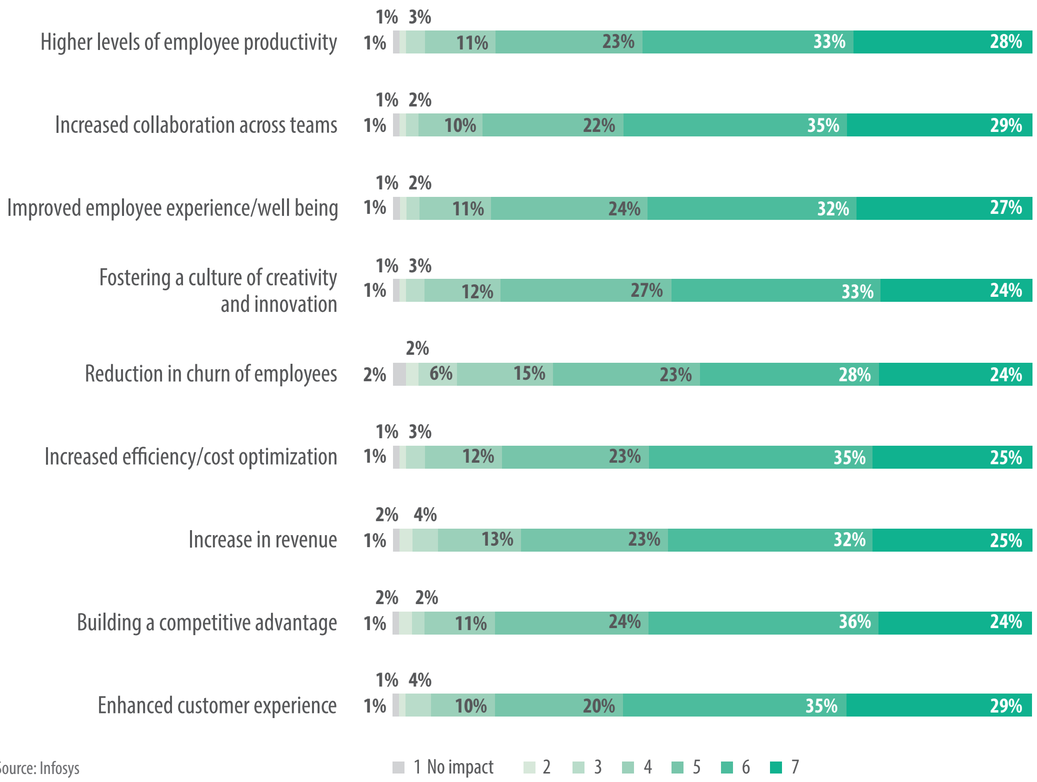
Senior Delivery Manager, Infosys Digital Workplace Services

Figure 3. Improved productivity and collaboration are the top reasons why organizations adopt workplace transformation solutions



Source: Infosys

Figure 4. Impact of workplace transformation on various business outcomes



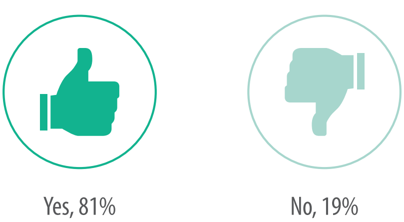
Source: Infosys

Every change makes a difference. For instance, a comprehensive, collaborative intranet portal helped boost collaboration for one of our manufacturing clients.[13] The employees were able to move from email-based discussions around processes, approvals, etc. to secure, seamless application-based access anywhere, anytime on multiple devices. It was a resounding success, with 100% user adoption in a single quarter!

Realizing the need to empower employees to do their jobs better and driving more value from the workplace faster, companies are actively investing in workplace transformation projects. Over 80% of respondents said they already have a well-defined workplace strategy in place. Of the remaining firms yet to define a strategy, around 60% plan to do it within the next 2 years. See Figure 5.

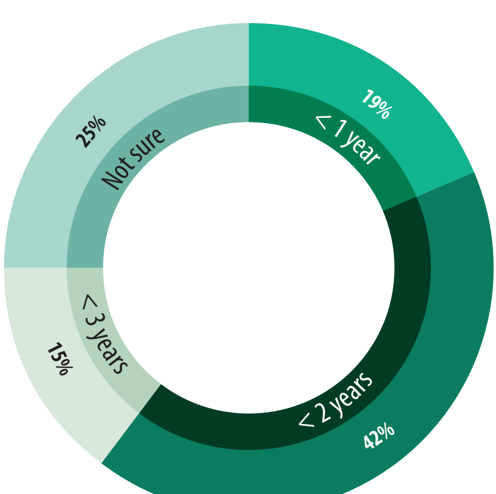
Figure 5. Progress on workplace transformation strategies

Does your organization currently have an outlined 'workplace transformation strategy' in place?



Source: Infosys

By when do you envisage a 'workplace transformation strategy' taking shape in your organization?



Source: Infosys

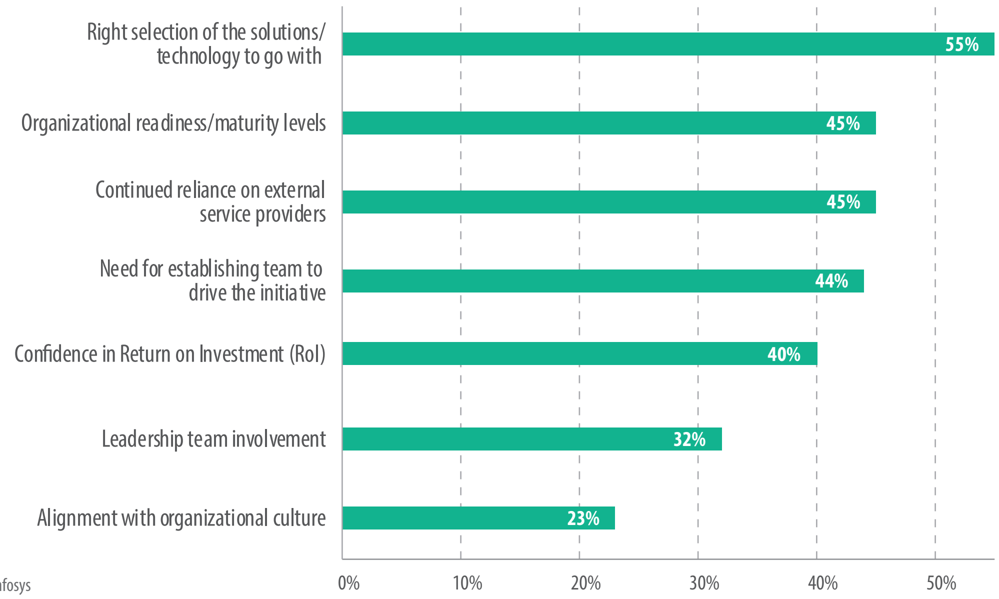
However, when it comes to implementation, there is a long way to go. Just 17% of respondents indicated that they have completed an implementation of workplace transformation strategies across the organization. Organizations have seen more success in implementation at a functional level, where 44% have completed transformation projects. And around 20% of companies are yet to start on the implementation journey. Organizations in Europe (83%) seem to make faster progress on workplace transformation when compared with those in ANZ and the USA.

If the benefits are evident, why are organizations not further along on their implementation roadmap? The road to this monumental change is not easy. Our findings echo those of Gartner's which found that "only one-fourth of organizations will successfully establish new ways of working through digital initiatives by 2021"[14]. Understanding the unique needs of the company, the employees, and identifying the right solution from a market teeming with options, is a challenge most companies face (55%). Then there is the question of organizational readiness for the change itself (45%) and for some, continued reliance on external partners, is also a challenge (45%). See Figure 6.

For companies implementing digital technology solutions, concerns around data security (77%) and obtaining a buy-in from across the organization (74%), are the topmost challenges. See Figure 7. Respondents in the ANZ are also more concerned than those in Europe & the USA, about investments towards upgrading infrastructure.

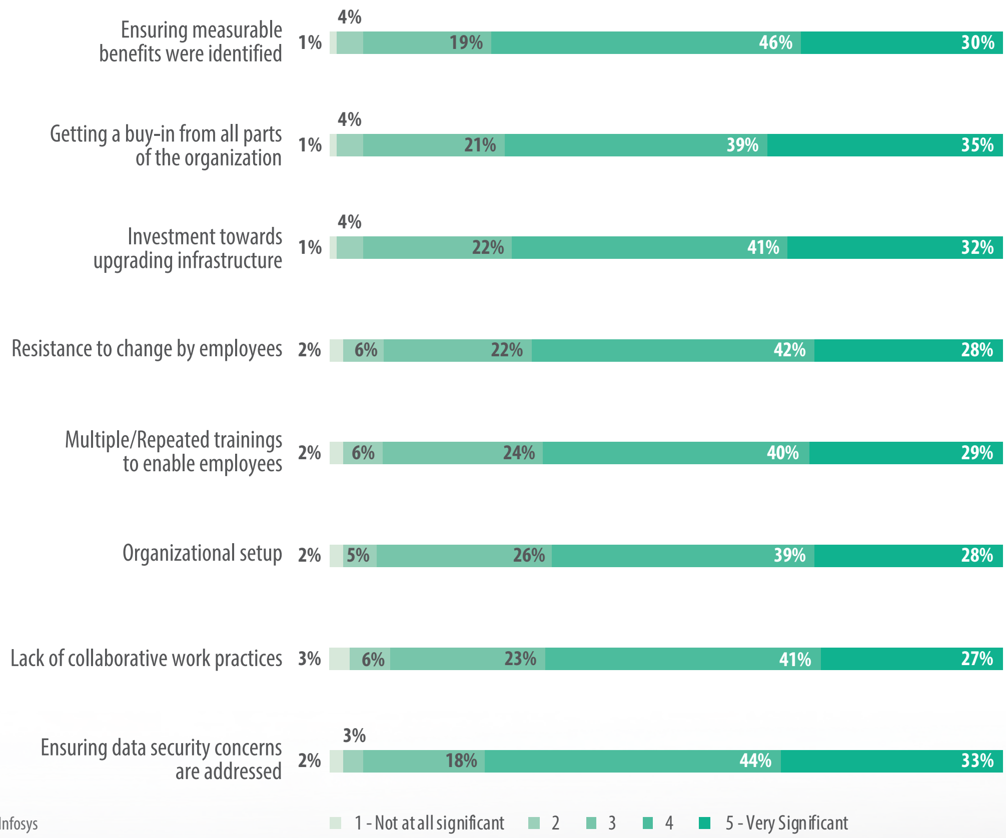
How do these challenges impact workplace transformation decisions? Who's in the driving seat when it comes to moving forward? Let's take a look.

Figure 6. The right selection of a solution is the major concern of organizations before embarking on the workplace transformation journey



Source: Infosys

Figure 7. Data security is a key challenge when implementing digital workplace solutions



Source: Infosys

Unlocking Value On All Fronts

When embarking on workplace transformation, organizations need to consider and prioritize its impact across three dimensions – digital, physical, and cultural. While digital tools and technologies make it easier to access relevant information and improve communication and collaboration, physical and cultural aspects also play a key role.

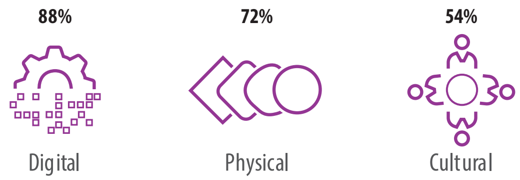
> *"There is a pressing need to infuse flexibility and the possibility to work in an environment without restrictions. Hence, we are looking at transparency in the connecting technology - people are on Skype/ computer/phone. Collaboration tools are utilized to drive reminders/accountability."*
>
> *- A Senior Vice President in the Automotive industry*

Workplace design that fosters interaction, allows incubation of ideas and contributes to employee health, wellness, and comfort can have a significant impact on productivity. Similarly, cultural factors such as work-life balance, stress, hierarchy, and engagement have a high impact on employee performance. Infosys' Digital Radar 2020 report[15] found that culture is a strong barrier in the shift to digital.

However, for now at least, digital tops the agenda for companies, with 88% of them having built it in their workplace transformation strategy. 57% of executives think that digital transformation will have the highest impact on their transition to a modern workplace. Physical and cultural transformation, rank second and third respectively. See Figure 8.

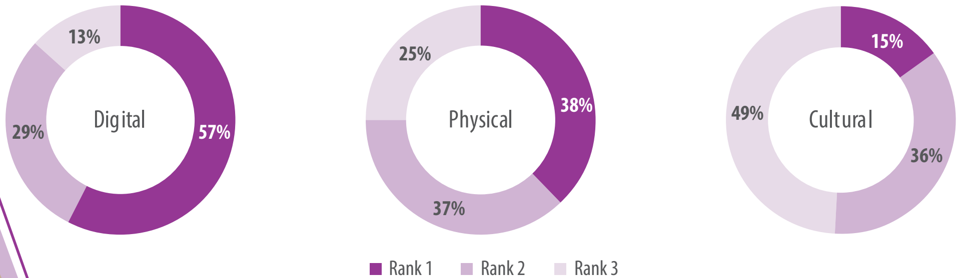
Figure 8. Digital tops the list of transformation priorities

Which of the following factors are built into your organization's 'workplace transformation strategy'?



Source: Infosys

Based on your opinion, please rank the following elements in order of their perceived impact on transformation of the workplace



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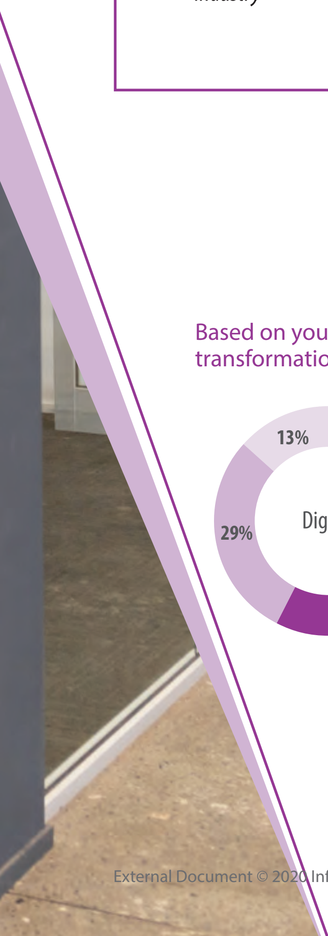
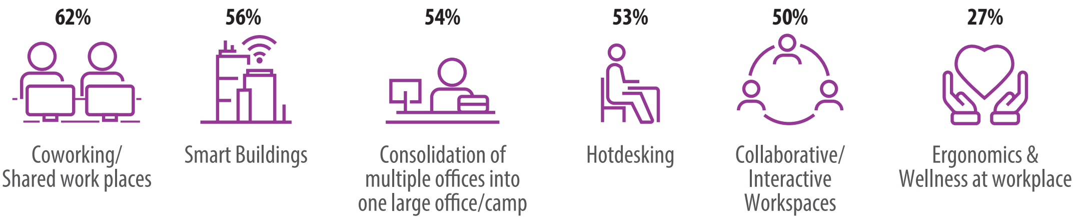


From a physical transformation standpoint, companies seem to be more interested in co-working/ shared workplaces (62%) and smart buildings (56%). However, consolidation of campuses and hot-desking seem to be more popular with respondents in ANZ. Ergonomics and wellness at the workplace rank low in priority, with only 27% of organizations expressing intent to take action on these lines. See Figure 9.

When it comes to organizational culture, the transformation priority is training and upskilling the current workforce to be digitally enabled (69%) and also introducing policies that enable a better work-life balance (56%). See Figure 10.

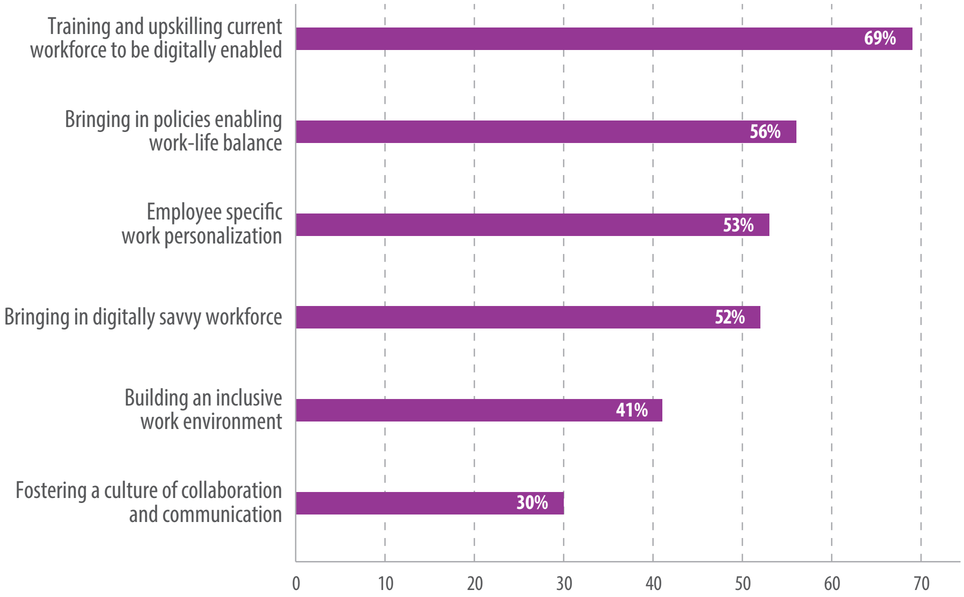
> *"We have a home-built tool which has a customized learning module for every employee that can be taken from anywhere and through any device. Fifty percent of our population is multi-skilled and 30% have already started working on their new skills, hence we would definitely call it a success."*
>
> *- A Senior Vice President in Software Services industry*

Figure 9. Co-working is a priority when it comes to physical transformation



Source: Infosys

Figure 10. Training and upskilling is the key focus area for cultural transformation



Source: Infosys

ANZ respondents also emphasize on employee-specific work personalization, as compared with those in the US and Europe.

The overwhelming preference for the digital component does raise the question if this order of priority is influenced by the ease at which these transformations can be achieved – after all it's relatively easy to implement a digital solution in comparison to driving cultural change and physical transformation comes at a steep cost. But even those ranking cultural changes as their lowest priority, must not forget that without a change in culture, digital and physical transformations cannot deliver their optimal ROI.

Digital priorities for the modern workplace

The need to boost productivity and open up channels of communication in an increasingly fragmented organization drives the preference for digital solutions, making enterprise productivity suites (76%) and enterprise communication software (74%), the first preference of many. See Figure 11. However, the selection of the solution depends on the features offered (69%) and the ease of adoption (55%). See Figure 12. Respondents in ANZ also look at tools that enable efficient time tracking and resource planning while for those in the US and Europe, alignment with the existing ecosystem is important.

The new 'idea' of organization

The whole idea behind workplace transformation is to create a work environment that is very similar to the consumer environment that each employee experiences daily. That's where the investment focus should be. An employee, as a consumer, experiences use of digital technology on a far more sophisticated level than they get as an employee. So, workplace experience, to them, seems like going back 30 years in the past.

For instance, take collaboration tools. Today as a consumer you can make instant video calls anywhere in the world using WhatsApp, FaceTime and similar tools. Yet at the workplace, you end up booking video rooms for calls - that's a lot of effort in planning and coordination when consumer grade technology could have given a better experience.

The workplace of the future is about agile & collaborative spaces, flexibility in time and location, and networks that can form and dissolve very rapidly.

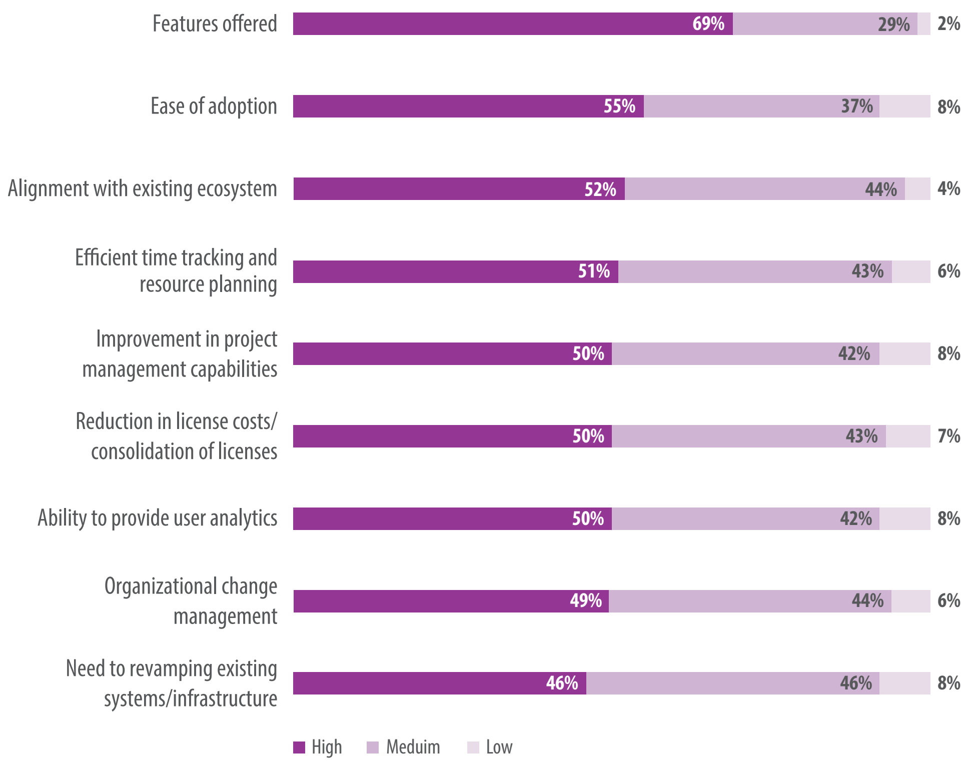
Richard Lobo,

EVP, Head HR- Infosys Limited

Figure 11. Preferred digital solution areas in the order of priority

Source: Infosys

Figure 12. Features offered tops the criterion list for solution selection

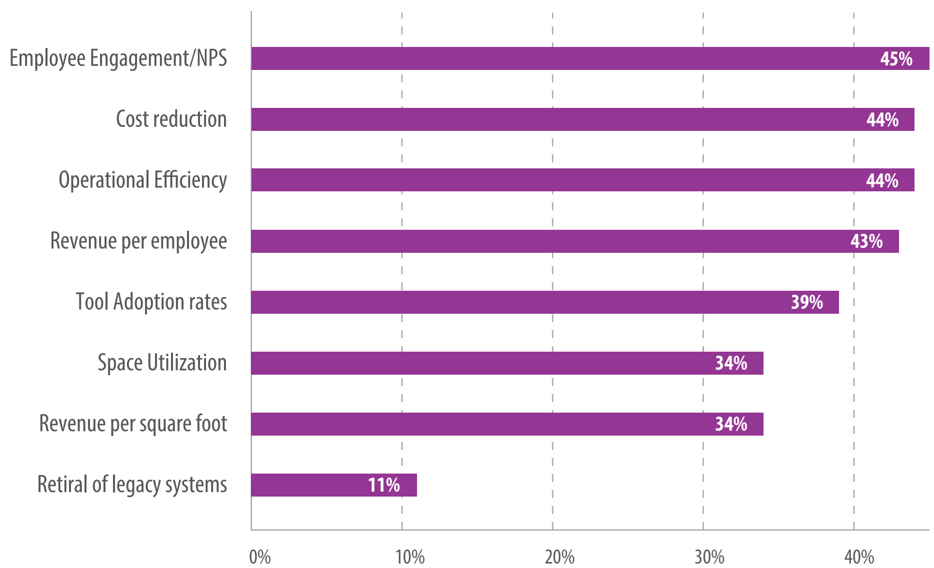


Source: Infosys

To measure the impact of these solutions, companies are looking at metrics such as employee engagement/ NPS (45%), cost reduction (44%), operational efficiency (44%), and revenue per employee (43%) and reporting positive outcomes. See Figure 13.

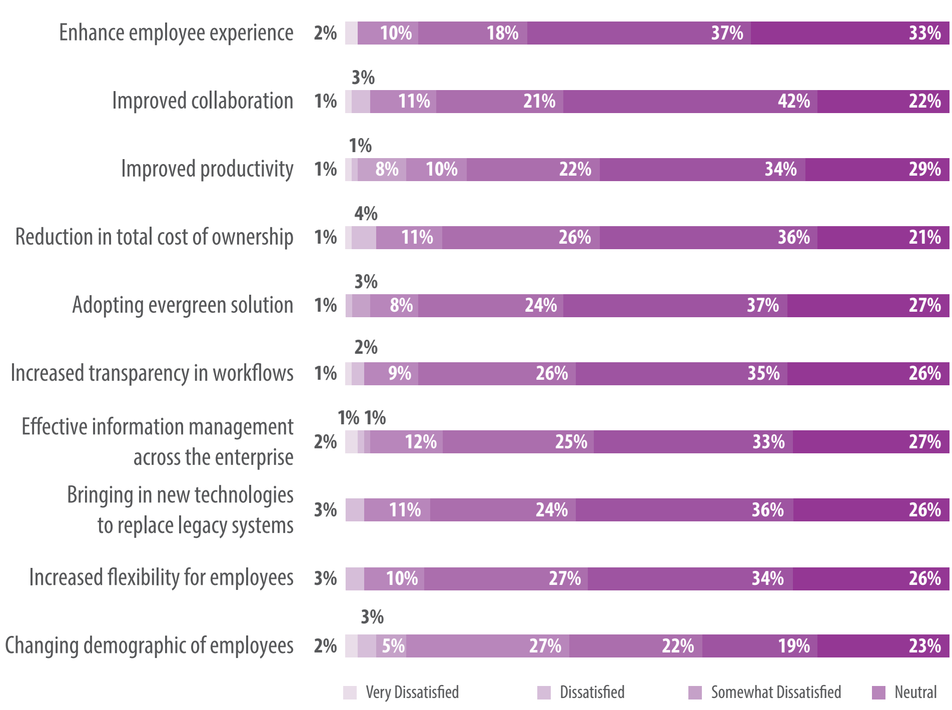
For instance, we found that after these solutions were implemented, three-quarters of respondents claimed an increase in employee productivity. Further, 88% of respondents said, employee experience improved. See Figure 14. More respondents from companies in ANZ report

Figure 13. Key metrics used to measure the success of workplace transformation strategy



Source: Infosys

Figure 14. A snapshot of satisfaction levels with outcomes delivered post-implementation



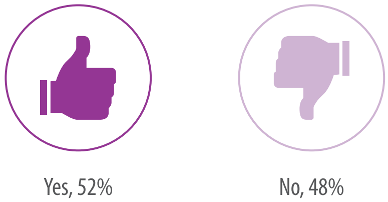
Source: Infosys

increased transparency in workflows as compared with their US and European counterparts. One of the cited benefits of digital solutions is the adoption of evergreen IT[16] solutions that could reduce the resources and energy needed to provide up-to-date and flexible services to users.

The role of external partners

When it comes to workplace transformation, many organizations are out of their depth. Identifying the right course, selecting the best-fit solution, and ensuring risk-free implementation requires skills and experience that they do not have in-house. In this situation, external partners with prior experience in similar projects can bring invaluable insights. However, when it comes to engaging an external partner for workforce transformation, the opinions are polarized – with 52% of respondents that have engaged an external partner and 48% that haven't. See Figure 15.

Figure 15. Engaged an external partner to support workplace transformation



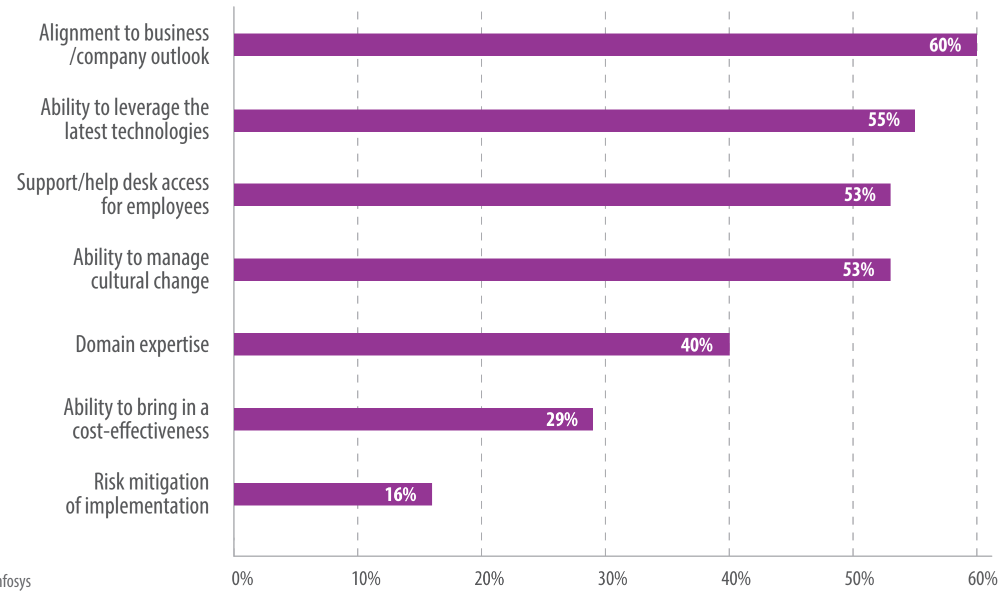
Source: Infosys

The advantages of getting a service provider on board are considered to be their ability to align with the business/ company outlook (60%) and to leverage the latest technologies (55%). Some companies also expect external partners to be able to provide support/helpdesk access for employees (53%) and manage cultural change (53%) initiated by the new technology landscape. See Figure 16.

While respondents in the US (60%) and Europe (51%) prefer partners with an ability to leverage the latest technologies, those in ANZ (64%) prioritize support/helpdesk access. External service providers are primarily chosen based on past relationships (59%), proven credentials (58%), and effective implementation capability (56%). See Figure 17.

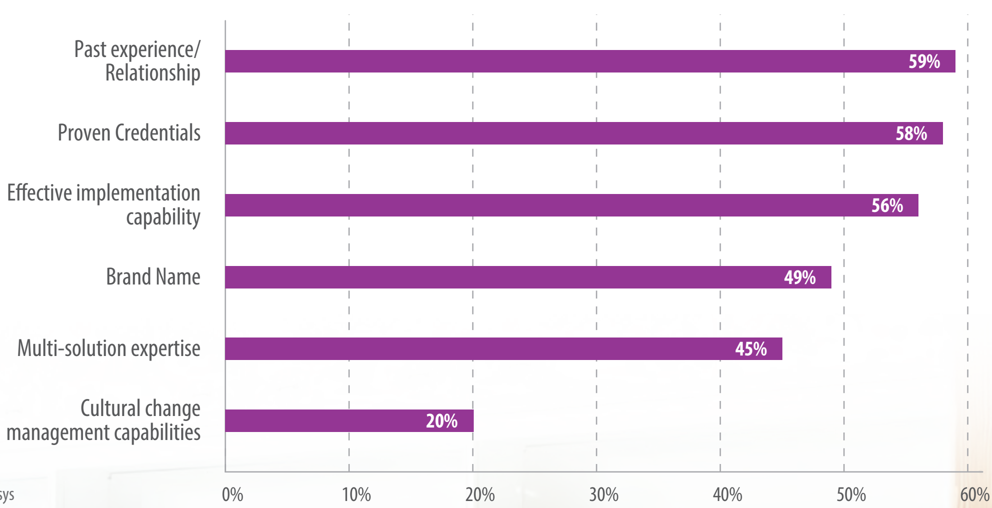
Consulting firms, perhaps predictably, take the lead in brainstorming and setting up the transformation roadmap, whereas technology firms have a slight lead in defining transition requirements, identifying and implementing the right digital workplace solution, and ensuring maintenance and continued support for the solution.

Figure 16. Key advantages sought from external partners



Source: Infosys

Figure 17. Factors that impact the choice of external partner



Source: Infosys

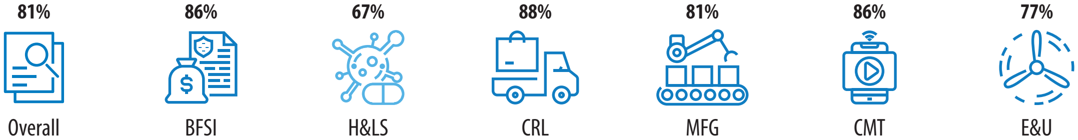
Transformational Agenda In The Industry

As with any trend, adoption happens at different rates across different industries – some are quick to uptake and are early adopters, whereas some wait and watch before deciding on their journey. Workplace transformation is no different.

For instance, our survey found that the adoption of a workplace transformation strategy is relatively low in the healthcare and life sciences industry, with only 67% of companies having outlined a strategy around it. On the other hand, companies in retail, consumer goods, and logistics are leading the pack, with 88% having a strategy in place. See Figure 18. When it comes to implementation, BFSI takes the lead, with 70% of respondents having completed implementation across the organization or for specific functions. See Figure 19.

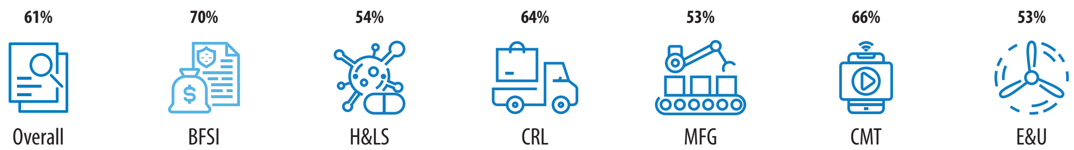
> *"While the need to move to modern workplaces is universally recognized, some industries are moving the dot faster than others."*
>
> *- Vivin George, Senior Principal Technology Architect*

Figure 18. Workplace transformation strategy in place across industries



Source: Infosys

Figure 19. Implementation progress across industries



Source: Infosys

Even as healthcare lags in adoption, H&LS CEOs are taking a much more active role in driving the strategy (62%) and developing the roadmap (70%) for workplace transformation.

The key business outcomes impacted by workplace transformation remain more or less similar across industries. These include increased collaboration across teams, higher levels of employee productivity, enhanced employee and customer experience, and increased efficiency. For BFSI and E&U building competitive advantage is also an important outcome.

Before embarking on a workplace transformation journey, the right selection of technology solutions and the need for establishing a team to drive the initiative are the common apprehensions across industries. Other than CRL and CMT, respondents from other industries were also apprehensive about organizational readiness for change. Respondents from MFG, CRL, and E&U also expressed concerns around the continued reliance on external service providers and those from CRL and CMT were worried about the ROI.

Except for E&U and H&LS, where Enterprise Communication Software takes precedence, other industries reported a preference for Enterprise Productivity Suites. To select a workplace transformation solution, one of the key benefits considered across industries, was the features offered. Ease of adoption was also a key consideration for everyone except CMT and E&U. Respondents from BFSI and CRL also considered solution alignment with the existing ecosystem and CMT and E&U focused on the solution's ability to provide user analytics and to reduce license costs. For MFG respondents, the ability to drive

organizational change management and improve project management capabilities were important, while H&LS prioritized efficient time tracking and resource planning.

While implementing a digital workplace solution, respondents across industries saw getting a buy-in from the organization as a key challenge. For everyone, except respondents from E&U, data security was a concern. Similarly, all industries except H&LS found it challenging to identify measurable benefits. For MFG, E&U, and H&LS respondents, investments towards upgrading the infrastructure was also a challenge.

Cost reduction was a key metric used to measure success across industries, except for E&U. Similarly, everyone except respondents from CMT used operational efficiency as a measure of success. Employee engagement was a key success metric for all industries except MFG. For CMT, MFG, and E&U, revenue per employee was also an important success metric. BFSI and E&U also emphasized tool adoption rates as a measure of success.

Improved productivity and collaboration post-implementation are the most visible outcomes that were witnessed across industries. Respondents from BFSI, CRL, and CMT also saw a significant improvement in employee experience. Apart from this, respondents from MFG reported a reduction in the total cost of ownership; E&U saw more effective information management, and H&LS found value in adopting evergreen solutions.

From these preferences, it is clear that irrespective of industry, the goal of workplace transformation remains the same – empower employees to be more productive, while delivering better outcomes for customers.

C-Suite Leads The Charge

A Forbes article cites that over half of the Fortune 500 will no longer exist in this decade[17]. Disruption is the new normal and changing with the times is the top priority for the C-suite today. A key component of leading this change is to ensure workforce readiness – ensuring that people have the right tools, technologies, systems, processes, and skills relevant to the business. In other words, our study reinforces that the C-suite needs to take a back-to-basics approach to workplace transformation—as workplaces rapidly evolve, they require a focus (or re-focus) on the human element.

Realizing the importance of equipping their workforce for the digital age, the C-suite is actively driving workplace transformation initiatives to make the organization more open, collaborative, and employee-friendly. The strategic priority of workplace transformation is evident from CEO interest in these initiatives. In our survey, CEOs - across industries and regions - were at the forefront when it came to embarking on a workplace transformation roadmap (45%) and contributing to its development (63%).

While CEOs have strong support from the CTOs/CIOs and backing of the Board of Directors, our study indicates that CHROs are playing less of a key role in this transformation. Only 3% of CHROs were influencing the decision to embark on a transformation journey, and only 19% contributed to developing the roadmap. Given that this is primarily a people initiative; we hope to see more CHRO involvement in the near future.

Figure 20. C-suite involvement in workplace transformation

Most influential in driving the organization to embark on a workplace transformation roadmap

Board of directors	CEO	CTO/CIO	CHRO	Other C-suite (CFO, COO, CMO, CHRO, etc.)	Others
12%	45%	32%	3%	7%	1%

Who all contributed to the development of theworkplace transformation roadmap?

Board of directors	CEO	CTO/CIO	CHRO	Other C-suite (CFO, COO, CMO, CHRO, etc.)	Others
31%	63%	53%	19%	22%	1%

Source: Infosys

"It is important to get a buy-in from the leadership – if they do not see the value or have apprehensions about the ROI/cost, the entire roadmap might lead to a dead end. Management should be open to acknowledge the risks and handle the same - the IT processes and the organization's goals must be all aligned."

- A CHRO in the Professional Services industry

Even as the directive for workplace transformation comes from the top, to ensure a successful transition, leaders need to:

- Instill a sense of shared purpose,
- Develop a skilled and committed leadership team, with visible accountability, and
- Execute practical short-interval projects that demonstrate value.

The mandate for the C-suite is to build for the future workforce, allowing more inclusion and diversity in a trust-based system that allows self-regulations enabled by transparent interactions.

Conclusion

The shift toward workplace transformation has begun in earnest, with our research showing that initiatives are driven from the top. In a bid to give 'consumer-like' experiences to their employees, our research shows that companies are investing in digital tools and technologies and fostering collaborative workplaces that boost productivity and experience. While the race to go digital is on, we found that physical and cultural transformation elements still take a back seat. As the adoption of digital technologies in the workplace increases, our research indicates that training and upskilling people to use these tools becomes a high priority. The findings from our report are a clear indication that companies have a lot to gain from building workplaces that augment the human potential. The players leading this transformation will hone their competitive edge and derive more value from their workplace, faster.

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