

IGLOO

2020 State of the Digital Workplace

A new decade brings expanded workplace boundaries and redefined collaboration.



Introduction

Organizations are making progress on digital transformation maturity, but the workplace is far from a productivity and collaboration utopia.

Last year, nearly \$1.2 trillion was spent on digital transformation efforts according to the International Data Corporation, and spending is on track to exceed \$2.3 trillion by 2023. What remains unclear, however, is if these investments addressed the communication and collaboration challenges of an evolved workplace.

2020 marks the start of a new decade of business — and new business challenges. COVID-19's rapid emergence has left countless workforces homebound and business leaders scrambling to support this new reality. As a result, we find ourselves at an inflection point for our definition of the modern workplace.

Communication and collaboration tools have broadened the boundaries of the modern workplace, leading to increased peer-to-peer communication, rapid knowledge sharing and collaboration, and more accessible ways for today's workers to safely and effectively share their thoughts. These tools have also physically changed the workplace, breaking boundaries for remote workers who are finally seeing their needs prioritized and feeling as much a part of the company culture as those inside the office.

But this influx of communication and collaboration options has also introduced major productivity issues. Teams lose focus when there are too many channels of communication, and rapidly switching between platforms can waste more time than the platforms are designed to save.

We have also arrived at a unique moment to reflect on our annual benchmarking of the digital workplace. As the world grapples with the fallout of a sudden shift to remote work due to the coronavirus, we are seeing a real-time stress test of communication and collaboration technology. Fortunately, this test comes at a time when employees were already growing more comfortable with remote work settings.

The 2020 State of the Digital Workplace Report offers insights from this unique intersection. We examine the wants and needs of the workforce apart from the business disruption caused by the coronavirus, but also identify key opportunities for immediate improvement in the face of the pandemic.

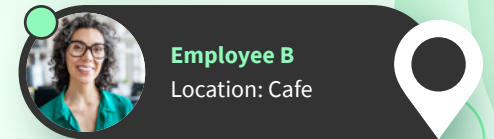
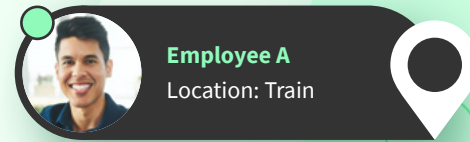
The demand for a more engaged, effective remote workforce has increased exponentially. It's more important than ever for us to listen and take action to help them succeed.

COVID-19's Impact on our 2020 Data

Igloo's 2020 State of the Digital Workplace survey was conducted in mid-February, before the most disruptive COVID-19 prevention measures were in place. As such, it is an extremely valuable snapshot of the state of remote work directly before COVID-19's real impact. Based on these results, we are able to predict what challenges newly remote employees are facing, and give insight into how leaders can address them.

01

Working remotely doesn't always mean working from home



01

With just over half of the workforce working remotely at least once a week, the preconceived notions about what “being remote” looks like are shifting.

02

The survey revealed that remote workers aren't always calling in from a home office and the majority still rely on dependable desktop applications to get their work done outside the office walls.

03

Organizations must consider the environment where employees are working, and carefully decide if the tools they are providing are right for the job and don't put employees at risk.

Our evolving workspaces

Advances in communication technology make it possible for employees to work from the comfort of their own homes. But as this slowly becomes the norm, so does working remotely in other settings.

The survey found that today's remote workers are highly comfortable joining the conference line from less traditional remote workspaces — from trendy coworking spaces to public transit. Whether this stems from convenience or necessity is unclear, but with more and more employees making the shift to remote work, the settings in which they do so grow and evolve in tandem.

Remote workers are highly comfortable joining the conference line from less traditional workspaces.



— **21%**

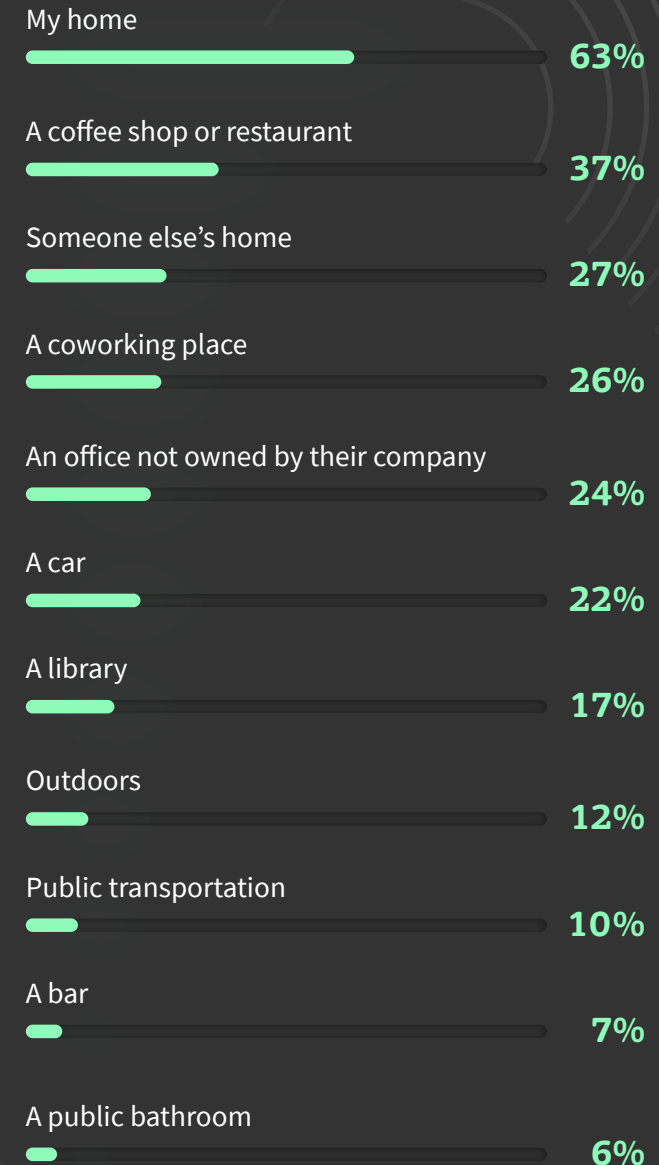
of respondents spend more than half their time on a mobile app to do their job

Determining your readiness for remote work

Shifting to a totally remote operation is part of the “new normal” business leaders will need to deal with in the future. But many organizations were caught off guard when shelter-in-place orders were issued, and learned the hard way that they were unprepared to support a newly remote workforce. Right now, leaders need to have answers to the following questions to make sure they aren’t blindsided if social distancing requirements demand fully remote work in the future:

- How many employees are able to work completely remotely?
- Is all company equipment properly cataloged and up-to-date?
- How are stay-at-home orders communicated to employees?
- Can your digital communication and collaboration tools handle the influx of newly remote employees?

Where are remote workers calling from?



Key Takeaways

Remote employees in our survey painted an evolving picture of their workspaces — and they gave their answers before the new reality of COVID-19 set in. Below are some key takeaways from the data:

“With mandatory work-from-home becoming part of our reality, employers must be ready to work with employees.”



Allow flexibility

Giving employees autonomy over their day-to-day schedules and accommodating their unique remote workspaces is important. Remote employees make the switch for many reasons, but many crave the flexibility.

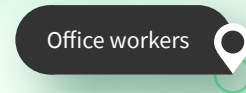
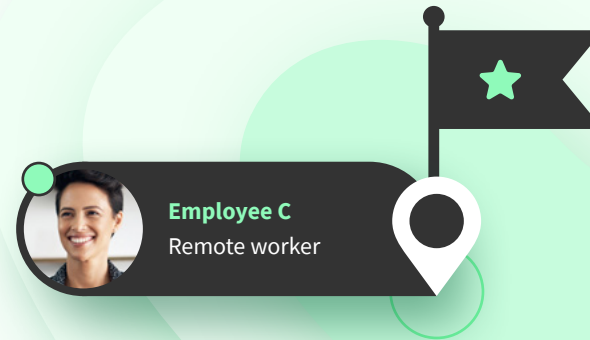


Advocate change

Support your remote workers by allowing them to take business outside the confines of their homes. Sponsor a membership at a local coworking space or send new remote employees a gift card to their local coffee shop to encourage a change of scenery.

02

Organizations are prioritizing the remote workforce



01

Historically, remote workers have felt out-of-the-loop and disengaged from their coworkers, but that's changing. The survey found that organizations are making greater efforts to support their remote workforces, listen to their opinions and include them in company culture.

02

It will be critical for employers to make sure everyone in the workforce can quickly shift to completely remote work in the case of mandatory work-from-home orders or quarantine measures. This means all tools, processes and resources are documented and easily accessible.

03

Remote workers feel more valued and heard, but still have ideas about how leadership can take inclusion even further. It's important leaders listen closely — nearly **four out of every five employees** say they face challenges office workers do not.

Prioritizing remote employees

Remote work has always brought its fair share of problems — and new ones continue to emerge. The survey found that nearly 80% of remote workers feel that working remotely presents challenges that in-office workers do not experience. This number is up 10% compared to last year's data.

The pain points of remote work are multi-faceted. Some stem from feelings of exclusion from company culture, and others are the product of unreliable, outdated collaboration technologies: 85% of remote workers have had at least one meeting interrupted due to technology issues like lost connections, Wi-Fi problems and incorrect dial-in information.

The good news is that organizations have taken note and made efforts to successfully alleviate some remote work pain points.

In fact, 93% of remote workers said their companies have made an effort to make them feel included in the company culture and 62% say their concerns are taken as seriously as their office-based coworkers' concerns, with 31% saying they feel their opinions are actually taken more seriously.



93%

of remote workers said their companies have made an effort to make them feel included in the company

Assembling your remote work toolkit

To adapt to unpredictable periods of remote work, companies need a centralized set of resources, processes and guidelines for remote work that is available and familiar to everyone in the company — whether they are in-office or remote. Every organization will have different needs, but as a baseline, you should be prepared to offer the following tools and resources:

- A manual, guide or Wiki that explains all of the organization's remote work policies.
- IT equipment (routers, cables, WiFi extenders, etc) that you can easily ship or order for teams or individuals.
- A collection of resources and training materials that cover the social, emotional and professional realities of remote work.



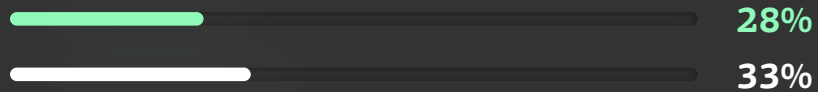
— 85%

of remote workers have had 1-2 meetings interrupted due to technology

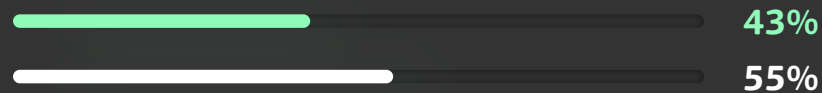
Communication and collaboration is improving for remote workers, but challenges still persist

● 2020 ● 2019

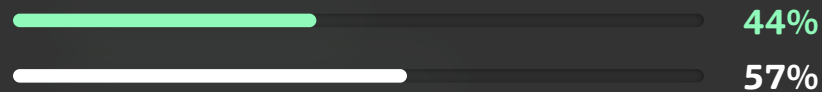
Not receiving information about process or policy changes



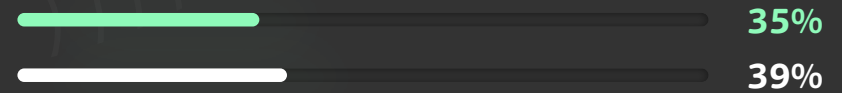
Being excluded from meetings or brainstorming



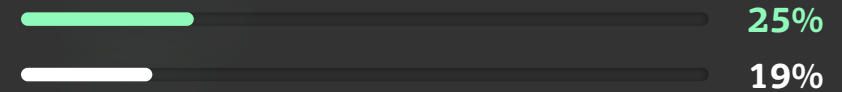
Missing out on important information because it is communicated in person



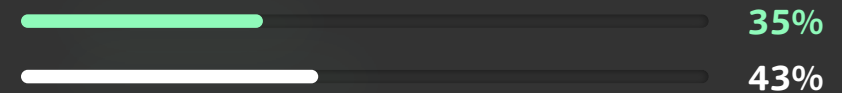
Being unable to access important documents or information



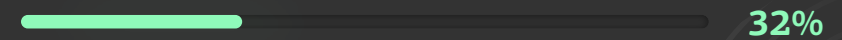
Finding the right tool to contact someone



Being unable to access people or groups due to technical issues



Being excluded from office-based events like happy hours, lunches, etc



**2019 data not collected for comparison*

Key Takeaways

Managing a remote workforce can be a challenging and complex task — but one that more businesses are confronting. As more organizations prioritize remote workers, we have learned the following:

“85% of remote workers have had at least one meeting interrupted due to technology issues like lost connections.”



Push inclusion

Organizations are making an effort to help remote workers feel part of the company, but there is always room for improvement.

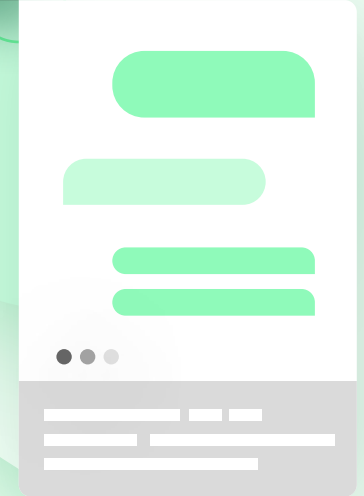
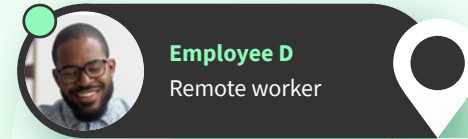


Make the effort

Survey respondents offered their own advice about how they think companies could improve, from hosting events for remote workers only to being more cognizant of time zones and prioritizing getting to know remote employees.

03

Professional boundaries are blurring in the workplace



01

Personal and non-work related messaging and communication has taken over the modern workplace. While this is a great method of creating personal relationships and camaraderie, it's also an overwhelming distraction.

02

Not only is it distracting, but it can have serious consequences for relationships and communication. Mistakenly sending a sensitive message (whether it's a love note or something less positive) to a coworker happens more frequently, and it's a serious cause for concern.

03

The silver lining to non-approved apps and social media is that they are creating social circles and opportunities for employees to bond while remote. Companies must carefully assess the value they bring versus the distraction they cause.

Securing workplace boundaries

The boundaries of the modern workplace aren't just expanding physically — relationships among coworkers are evolving as well. The influx of communication and collaboration tools necessary for bringing employees together has succeeded in that regard, with some interesting side effects.

Nearly half (51%) of respondents say they are overwhelmed by the amount of non-work related messages sent via apps like Slack and Teams.

Even more, (64%) have sent chats to a coworker sitting right next to them — employees might be more connected, but some are now talking less.

Alarming, 39% of respondents have sent a message to a coworker that they wish they did not — the contents of which include everything from a mistakenly sent love note to sensitive company information shared with the wrong people.

Half of employees are overwhelmed with non-work chat messages

(e.g. Slack, Teams, Google Hangouts)

51% Yes

49% No

Considering the context of remote work

Remote employees have different needs based on their department, function and role. For many employees, in-person interaction is a part of the day-to-day. Sales reps are used to in-person demos and pitches, and IT workers may prefer on-site diagnostics and troubleshooting. The support and resources offered should match the context where employees find themselves. Questions to consider include:

- Do employees have the tools they need to perform tasks that usually allow them to be physically present while working remotely?
- Do any processes or procedures put employees' health at risk?
- Do employees need special accommodations because of their physical locations?



— **4 out of 5**

remote workers say they face challenges
office workers do not

Key Takeaways

As our definition of the workplace evolves, so does our concept of how to keep it safe and secure. As technology allows us to engage with employees more than ever, organizations should keep the following in mind:

"39% of respondents have sent a message to a coworker that they wish they did not."



Monitor platforms

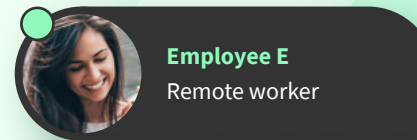
With the rise of non-work related chats flowing between coworkers, it's critical that organizations communicate the platforms they plan to monitor and why.



Form friendships outside of work

It's important to allow your employees some channel(s) of informal communication to blow off steam, get to know one another and have conversations about things outside of work. Leveraging spaces within your intranet to support social interactions is a great way to build a positive and inclusive corporate culture.

04



Redefining collaboration hinges on eliminating application fatigue

01

Heightened collaboration is essential in today's digital workplace, especially with the rise of remote work. But the positive aspects of collaboration can be quickly snuffed out by the sheer volume of tools it takes to get there.

02

A slice of today's workforce is unsatisfied with the current tech landscape. Technology holdouts could threaten progress, especially if mandatory remote work becomes a more entrenched part of our reality.

03

The survey found that workers are switching between multiple approved and non-approved apps just to get their work done. What's more, employees are increasingly struggling to find internal documents.

Avoiding app fatigue

A multitude of communication and collaboration platforms has done more than just overload employees with non-work related messages. It's created a disjointed ecosystem of apps that's keeping them from being productive.

Chat platforms are great for creating organized communication channels by topic, category or project. They give employees a lower barrier to entry to the conversation and encourage freedom of expression in a safe way. But what used to be a one-to-one mode of communication has become a source of rapid-fire knowledge-sharing. Individuals are forced to change focus from one platform, app or project to the next when a new

notification comes through, threatening productivity and collaboration.

The survey found that 55% of workers use at least two company approved apps just to do their jobs on a daily basis. At the same time, 57% of employees use at least one non-company approved app.

Knowledge-sharing is also threatened by this collaboration tool fatigue. The percentage of employees who avoid sharing documents because they either can't find them or it would take too long to do so has increased to more than half of workers (51%).



— **51%**

of employees avoid sharing documents because they can't find them or it would take too long to do so



— **1 in 4**

employees use at least 2 non-approved communication and collaboration apps

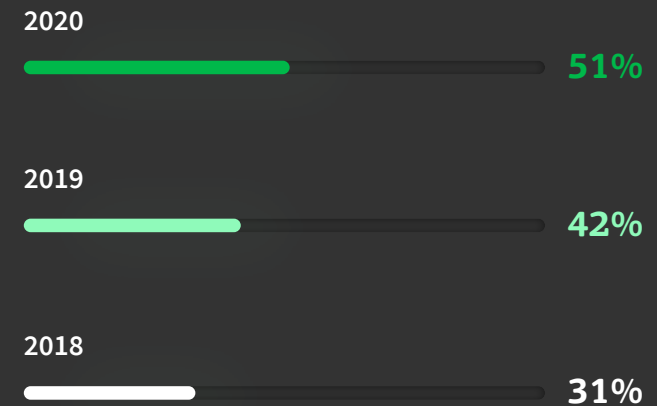
Some workers' needs still aren't being met

While progress has been made, we are constantly reminded that a remote workforce has evolving needs.

Survey respondents who said they were unsatisfied with the communication and collaboration apps their company uses cite reliability, ease-of-use and being out-of-date as the top three sources of dissatisfaction. Of these respondents, 40% are frustrated when trying to do their jobs and 32% feel less engaged with their coworkers — which was the top source of dissatisfaction among remote workers in this group.

Document sharing is getting harder

Each year, the number of employees who say they have avoided sharing a document with a colleague has risen steadily.



Taking action for a more empowered remote workforce

On their own, communication and collaboration tools can solve many productivity problems and increase engagement. But without adequate integration and training, they can have the opposite result.

To alleviate this:

01

Know the culture you have and the culture that you want. To help assess what you have, use these four criteria to select a new tool to empower your workforce:

- **Evaluate purpose and process**
- **Evaluate the context in which workers will use it**
- **Determine the KPIs, including how they will be measured and benchmarked**
- **Define objectives for the tool and measure frequently**

02

Decide which tools you need to turn off and which you simply need to consolidate.

03

Remember that overhauling an entire system isn't the only option. It may make sense to use a module or a different system than the rest of the company if it means one department will be more productive — 18% of respondents in the survey indicated they are already doing this.

04

Define which channels the tool is dedicated to. If it is project-based, integrate that communication channel with the project page in the intranet system. Rather than an all-in-one source of communication, the communication channel becomes a Q&A forum, and the more permanent knowledge management aspects of the project live on the project page itself.

An evolved approach to the intranet

As times change, so does our philosophy on how tools can work best for teams and departments. While company-wide intranets have been the standard, more agile technology and evolving styles of work have made new solutions possible — and data shows that demand for a new approach is high.

Nearly 80% of this year's respondents said they would overhaul their department's intranet space with solutions specific to their line of business if they could, and described their department's current solutions as buggy, outdated and difficult to use. Perhaps this explains why 62% of employees we surveyed still rely on email and file sharing for their communication and collaboration needs. The results show plainly that demand for better communication and collaboration solutions isn't always solved solely by a single company-wide solution, but rather by department-specific offerings.

78%

Would overhaul their entire department's intranet space with solutions specific to their line of business if they could

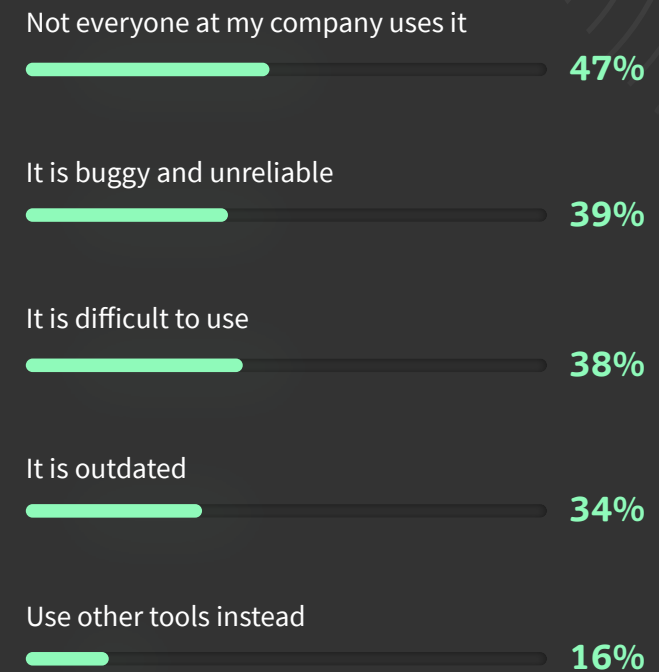
62%

Still rely on email and file sharing for their communication and collaboration needs

We expect the demand to grow for more tailored, purpose-built and efficient departmental zones comprised of solutions built specifically around the needs of a department and without the cost and complexity of replacing the entire intranet. Teams get an easier, more efficient intranet destination with just the apps that keep their department running. Unlike organization-wide intranet replacement initiatives, departmental zones usually just require the department's approval to purchase and come with a time to value that's measured in days, not months.

As unforeseen crises like the COVID-19 pandemic continue to change the way we work, more tailored intranet solutions that connect individual teams and departments will become a necessity. In time, as organizations grow and scale, these departmental zones will form the foundation of a new company-wide digital ecosystem — one that is more efficient, serves the unique needs of teams better and is far less costly to implement. Ultimately, this new approach will enable more effective teams and improve culture and engagement.

Why employees are not using the intranet



Conclusion

The digital workplace of today is vastly different from the workplace a decade ago — due to both age-old challenges as well as some new realities. We have more tools, more flexibility in where we do our work and more communication with coworkers, whether they sit next to us or work half a world away.

The ability for teams to thrive in a remote work environment is more important — and more valuable — than ever before. Accordingly, we must focus on how empowered, engaged and productive our employees can be from afar — and that includes making sure they have the right tools at their disposal. Ultimately, companies that can quickly scale their remote workforces up and down will be most resilient to the new economic realities that are emerging in 2020.

As organizations move into digital transformation maturity they must focus not only on providing tools to support heightened collaboration and communication, but on intelligently providing the right tools to the right departments — regardless of where they work.

“The ability for teams to thrive in a remote work environment is more important — and more valuable — than ever before.”

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About Igloo Software

Igloo is a leading provider of digital workplace solutions, helping companies move beyond traditional intranets to inspiring digital destinations that improve communication, knowledge sharing, collaboration, and culture. All Igloo solutions are 100% cloud-based, mobile-enabled, and integrate with the leading enterprise systems and cloud

apps your business relies on. By centralizing all information, Igloo provides a single-source-of-truth and enables a more productive and engaged workforce.

For more information, please visit igloosoftware.com