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The Future Of Work Calls For A Consumption-Based Digital Workplace

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FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY
ORANGE BUSINESS SERVICES | FEBRUARY 2022

Modern Work Requires An Agile Employee Computing Strategy

The mass move to remote work in 2020 and 2021 illuminated the importance of employee devices and proved that an agile employee computing strategy is essential for business continuity, anywhere-work enablement, digital transformation, and the protection of enterprise data. Technology and business leaders are under pressure to develop a solid employee computing foundation for modern work.¹

To explore this topic, Orange commissioned Forrester Consulting to conduct an online survey of senior decision makers in operations, finance and accounting, digital, HR, and innovation at large enterprises in North America, EMEA, and Asia Pacific (APAC). Forrester found that improving employee experience (EX) is a top priority for business leaders, but their organizations struggle with inconsistent EX across employee types and device types. Many are looking to consumption-based digital workplace solutions as the answer.

Key Findings



Improving employee experience and productivity are top priorities for business leaders. However, nearly two in five rate aspects of their employee computing as average or poor.



An inconsistent experience for office-based, home-based, and frontline workers is the top challenge with employee computing. Security and risk challenges are also top of mind.



Eighty-six percent of respondents expect their organizations to increase investment in consumption-based digital workplace solutions over the next 12 months.

Improving Employee Experience And Productivity Are Top Priorities

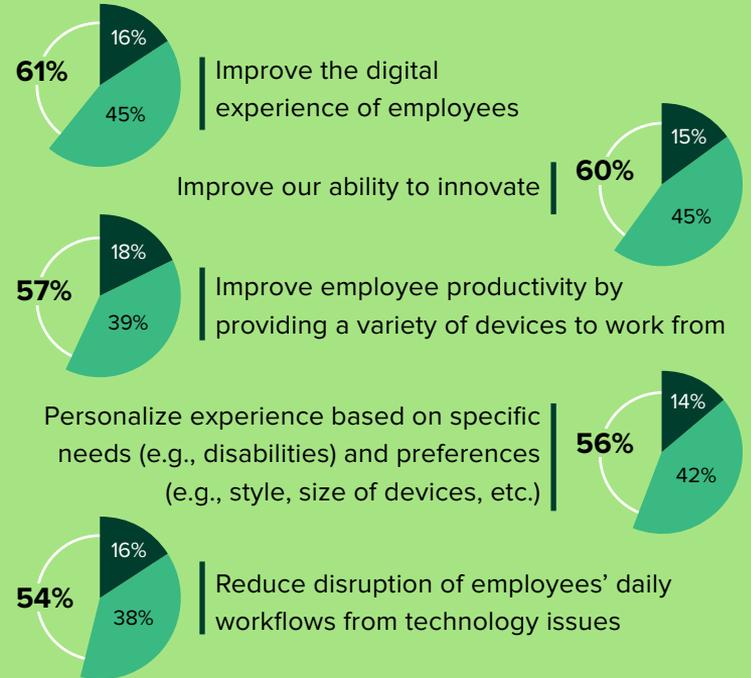
For senior business leaders, improving EX is the top priority when it comes to employee computing initiatives. Other top priorities also focus on EX, such as raising productivity by providing a variety of work devices and providing personalized experiences based on specific needs. Aside from EX initiatives, improving the organization's ability to innovate also ranked highly for business leaders.

Priorities are largely consistent globally, but respondents in APAC report a larger emphasis on aligning technology with work tasks, locations, and device types than organizations in North America and EMEA. Priorities vary widely by industry, with healthcare organizations most focused on personalizing experiences based on specific needs and preferences, while retail firms mostly want to improve their innovation capabilities.

“Which of the following initiatives is your organization prioritizing for employee experience and employee computing?”

● Critical priority

● High priority



Base: 165 vice president level and above business decision makers involved in employee experience and end-user computing in North America, EMEA, and Asia Pacific whose firms are interested in or planning to implement consumption-based digital workplace solutions

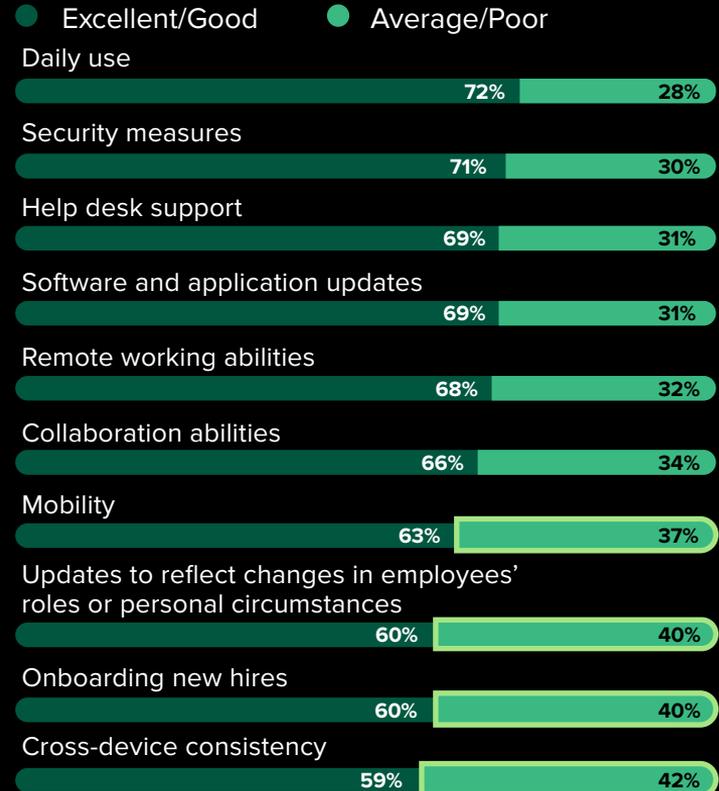
Note: Top responses shown

Source: A commissioned study conducted by Forrester Consulting on behalf of Orange Business Solutions, October 2021

Key Aspects Of Employee Computing Experience Need Improvement

Over 40% of respondents rate their cross-device consistency as average or poor, and 37% say the same about mobility, indicating that organizations have room for improvement when it comes to providing consistent experiences across devices and work locations. A similar proportion of respondents also poorly rate their organization's ability to provide a good experience throughout an employee's journey from onboarding through changes in personal circumstances.

“How would you rate the following aspects of your employee computing experience?”



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Note: Percentages might not equal 100 because of rounding

Source: A commissioned study conducted by Forrester Consulting on behalf of Orange Business Solutions, October 2021

Yet EX Is The Least Influential Factor In Employee Computing Strategy

Despite recognizing the need for improvement, respondents indicate that employee experience ranks at the bottom of the list for factors influencing their organization's employee computing strategy. Security, cost efficiency, and performance are unsurprisingly the most influential factors for the majority of respondents' firms.

"I see three broad priorities. It is very important to put employee experience first. Secondly, the focus on delivery of apps from anywhere, anytime. And we should always take security and resiliency [into account]."



– **Global partner development lead, cloud computing provider**

"Which of the following are the most influential factors in your employee computing strategy?"

● Rank 1 to 3 (Most influential) ● Rank 4 ● Rank 5 to 7 (Least influential)

Security



Cost efficiency



Performance



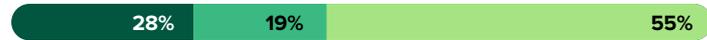
Ease of management (deployment and update)



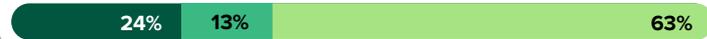
Vendor relationship/existing business contracts



Anywhere-work/hybrid work enablement



EX/employee empowerment



Inconsistent Employee Experience And Security Are Top Challenges

Inconsistent experiences for office-based, home-based, and frontline workers tops the list of challenges organizations face with employee computing, followed by security and risk management challenges. As employee expectations and attrition force companies to commit to anywhere work, organizations' employee computing strategies must securely serve workers based on their needs at any location.²

“If you have a different experience on devices, so mobile versus PC, for example, that’s friction [for] a knowledge worker. If you think about frontline, that’s a massive market that’s being overlooked and very inconsistent on the experience.”



– **Head of experience solutions, cloud computing and virtualization technology company**

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“What are the main challenges your organization experiences with employee computing?”

38%

Lack of a consistent experience for office-based, home-based, and frontline workers



36%

Security and risk management challenges



29%

Routine disruption caused by employee-compute devices or employee-compute environment/apps



28%

Environment is hard to manage/ there are management gaps



28%

Inability to personalize devices and applications based on individual preferences or position needs



Base: 165 vice president level and above business decision makers involved in employee experience and end-user computing in North America, EMEA, and Asia Pacific whose firms are interested in or planning to implement consumption-based digital workplace solutions

Note: Showing top five results

Source: A commissioned study conducted by Forrester Consulting on behalf of Orange Business Solutions, October 2021

These Challenges Reduce Employee Productivity

Respondents note that the main impacts of their challenges with employee computing are reduced employee productivity and increased time needed for new employees to become productive. Burnout, disengagement, and high turnover rates are also top of mind for respondents when considering the impact of employee computing challenges.

Employee burnout grew during the pandemic and impacted organizations in many ways, including causing damaged customer relationships, poor employee performance, and higher attrition.³ This creates further urgency to tackle employee computing challenges that exacerbate the existing burnout problem many organizations are facing.

“What impact do these challenges have on employee experience and engagement?”



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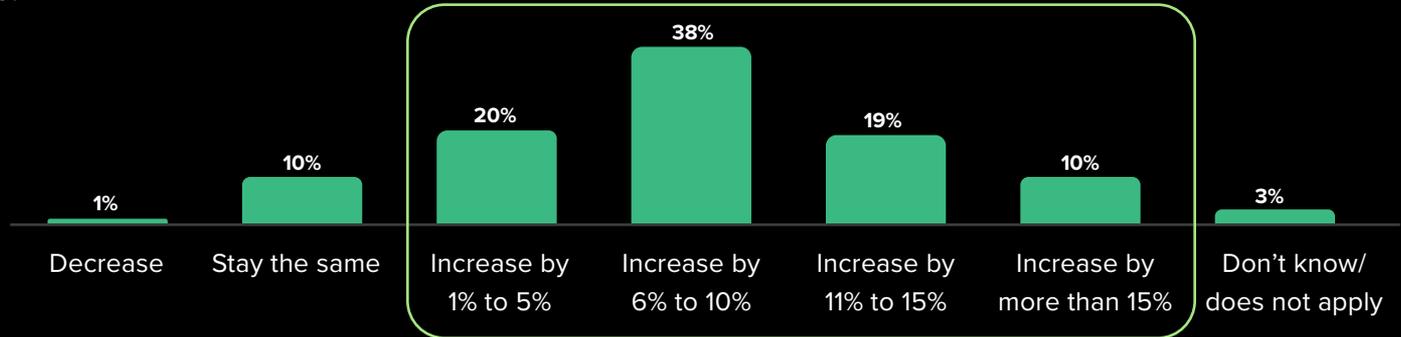
Base: 165 vice president level and above business decision makers involved in employee experience and end-user computing in North America, EMEA, and Asia Pacific whose firms are interested in or planning to implement consumption-based digital workplace solutions
Source: A commissioned study conducted by Forrester Consulting on behalf of Orange Business Solutions, October 2021

Firms Plan To Invest In Consumption-Based Digital Workplaces

Eighty-seven percent of respondents expect their organizations to increase investment in consumption-based digital workplace solutions over the next 12 months. Firms in APAC are leading the way, with 95% of respondents in the region stating their companies plan to increase investment, compared to 88% in EMEA and 77% in North America. Organizations are clearly considering this as a way to tackle existing EX challenges.

We define a consumption-based digital workplace as an approach that combines device-as-a-service and desktop-as-a-service (DaaS) models, where you pay only for what you use. Device as a service is where you purchase devices in consumption model basis, usually with a 30-day lease. DaaS is an approach of cloud hosting and simplifying the management of virtual desktop infrastructure.

“How do you expect your company’s investment in consumption-based digital workplace solutions to change over the next 12 months?”

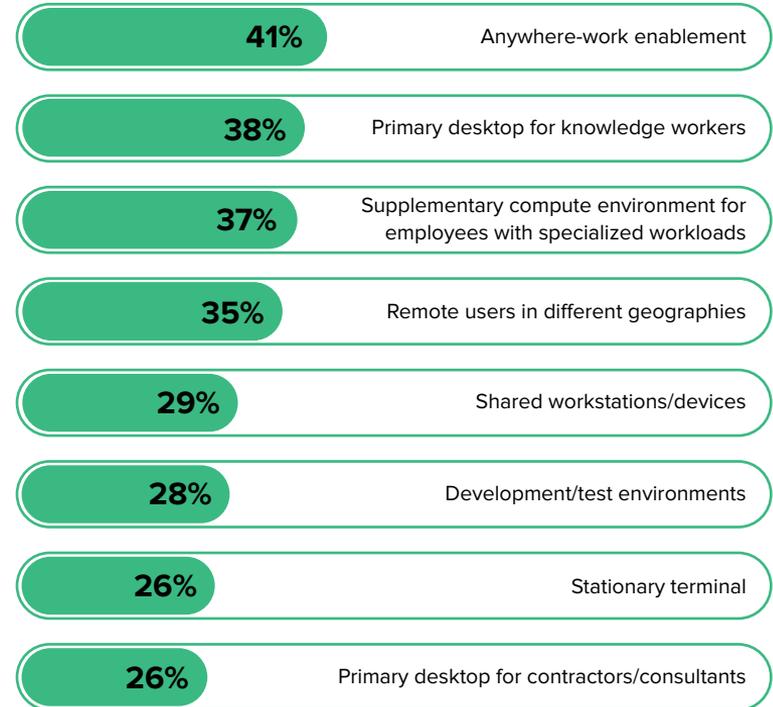


Consumption-Based Digital Workplaces Enable A Wide Range Of Use Cases

Anywhere-work enablement is top of mind for business leaders when it comes to use cases for consumption-based digital workplace solutions. Respondents also note its use as a primary desktop for knowledge workers as well as employees with specialized compute environments and remote workers. They view it as a solution to tackling their challenges around providing a consistent employee experience for office-based, home-based, and frontline workers.

In addition, over a quarter of respondents see consumption-based digital workplace solutions as a way to provide a primary desktop for contractors, consultants, and call center agents, enabling agile device provisioning for firms with temporary or fluid workforces.

“For which use cases do you anticipate your organization will use consumption-based digital workplace solutions?”



Firms Expect Financial And EX Benefits From Consumption-Based Digital Workplaces

Business leaders recognize that consumption-based digital workplaces enable financial benefits such as reduced costs, reduced IT issues, and lower costs of device management. Improved employee productivity is also one of the top expected benefits, along with reduced disruptions to employee's workflows.

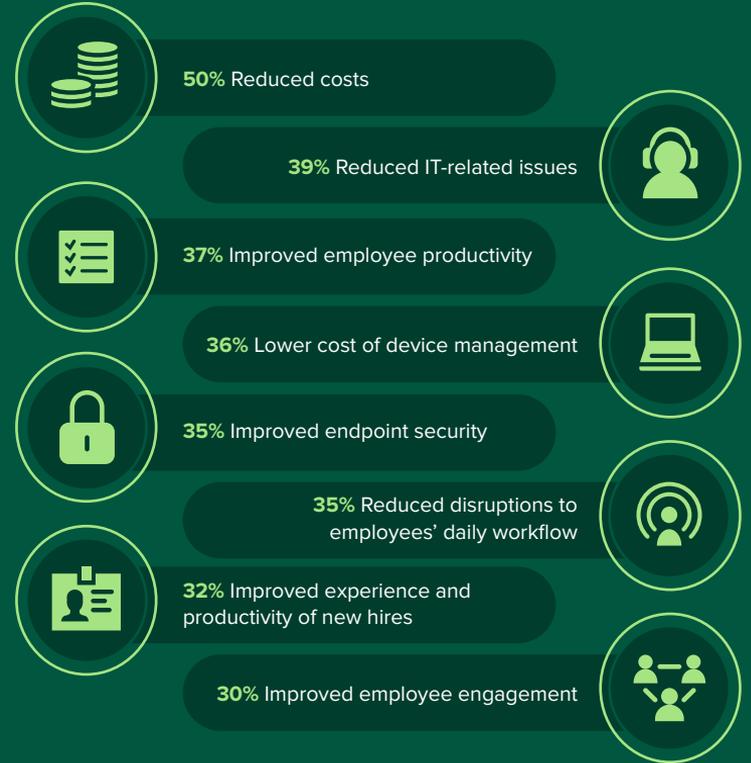
“This as-a-service model affords [IT] the ability to actually leverage the economies of scale of the provider, which is why this model really could benefit companies in a big way.”



– **Head of experience solutions, cloud computing and virtualization technology company**

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“What benefits does your organization expect to achieve by implementing consumption-based digital workplace solutions?”



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Note: Showing top results

Source: A commissioned study conducted by Forrester Consulting on behalf of Orange Business Solutions, October 2021

Conclusion

Device purchasing is often driven by different business priorities than EX, including security, cost efficiency and performance. To better empower employees, organizations must pursue a strategy that meets these business priorities as well as EX. Our study of senior business leaders in enterprises found that:

- Key aspects of employee computing experience need improvement, such as mobility and cross-device consistency. An inconsistent employee experience is a top challenge for organizations.
- Firms plan to increase investment in consumption-based digital workplace solutions to tackle challenges.
- Consumption-based digital workplaces are expected to enable financial benefits as well as improvements in employee experience and productivity.

Project Director:

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Contributing Research:

Forrester's infrastructure and
operations research group



Methodology

This Opportunity Snapshot was commissioned by Orange Business Services. Forrester Consulting conducted a custom survey of 165 vice president level and above business decision-makers in North America, EMEA, and APAC. The custom survey began and was completed in October 2021.

ENDNOTES

- ¹ Source: "The State Of Employee Computing, 2021," Forrester Research, Inc., August 2, 2021.
² Source: "Predictions 2022: The Future Of Work," Forrester Research, Inc., November 2, 2021.
³ Source: "The People Leader's Guide To Burnout", Forrester Research, Inc., January 11, 2022.

ABOUT FORRESTER CONSULTING

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Demographics

GEOGRAPHY

| | |
|---------------|------|
| North America | N=55 |
| EMEA | N=55 |
| APAC | N=55 |

INDUSTRY

| | |
|--------------------|------------|
| Financial services | 25% |
| Healthcare | 25% |
| Manufacturing | 25% |
| Retail | 25% |

COMPANY SIZE

| | |
|---------------------------|------------|
| 4,000 to 4,999 employees | 54% |
| 5,000 to 19,999 employees | 28% |
| 20,000 or more employees | 18% |

RESPONDENT ROLE

| | |
|--------------------|------------|
| Operations | 31% |
| Finance/accounting | 25% |
| Digital | 19% |
| Human resources | 18% |
| Innovation | 7% |

A top-down view of a person's hands typing on a silver laptop. The desk is cluttered with office supplies: a black speaker on the left, a corded office phone with a display screen, a white cordless phone, a cup of coffee with latte art, and a tablet. The person is wearing a striped shirt and a watch. The entire scene is dimly lit, with the Forrester logo overlaid in the center.

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