



The new workplace is
not an office, it's
people

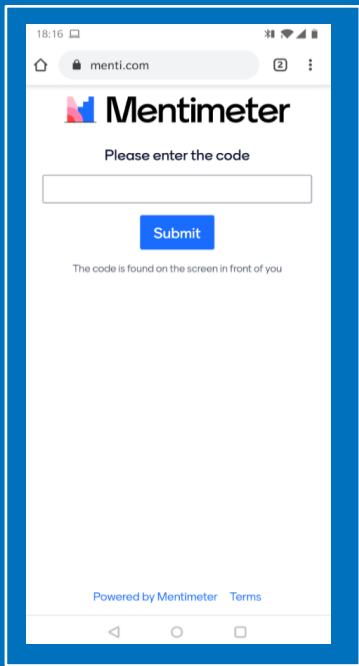
2020 Intelligent Workplace Report



Welcome



Webinar Etiquette

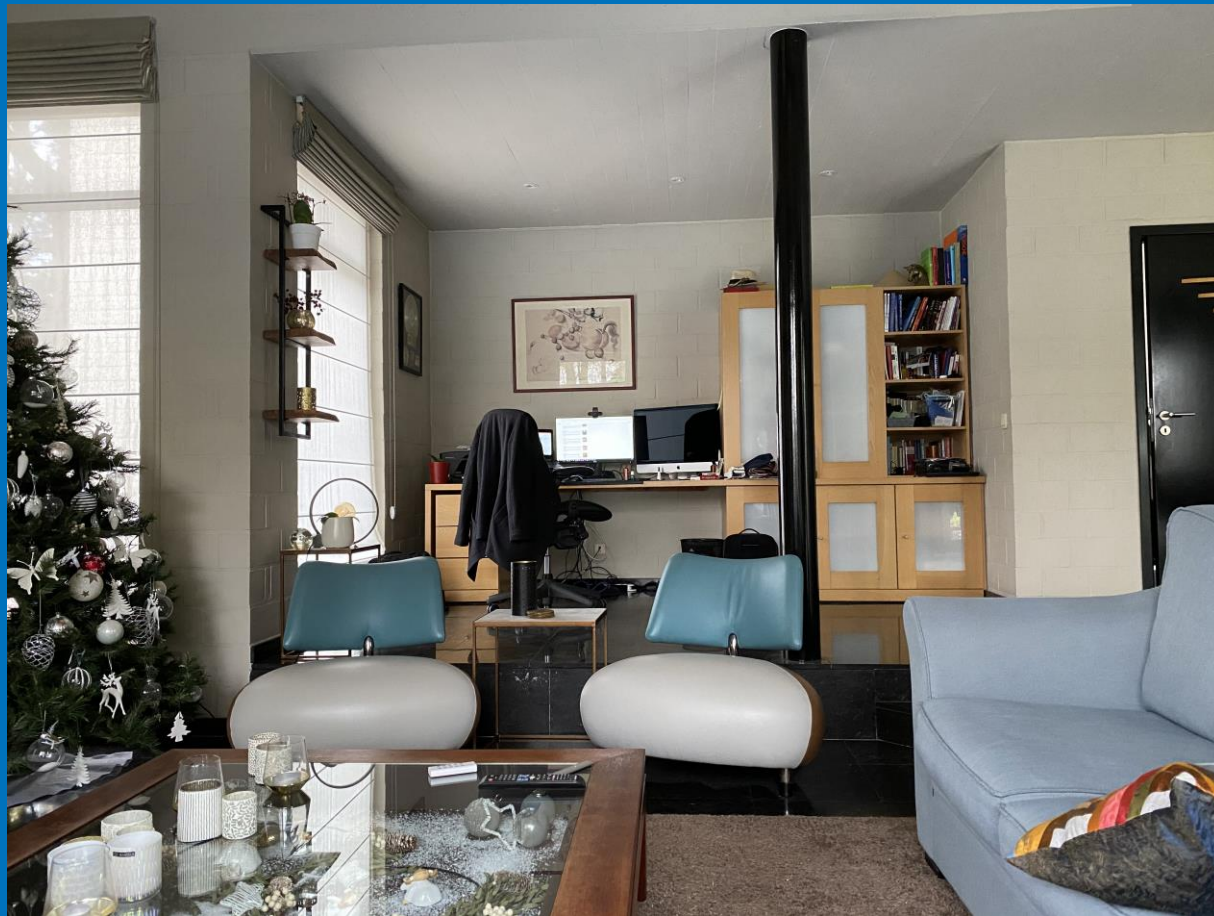


- The session will be in Dutch, the slides in English
- You have been muted
- If you have a question, please post it in the chat
- We will also ask your opinion in some polls using MENTI.COM
- This session will be recorded



We are delighted you take the time for us

I'm going to my work, becomes



March 2020 will be mentioned in history as the
biggest digital training course in the world

Steven Van Belleghem



Key workplace challenges



Attract and retain talent

Use space and modern technologies to generate powerful PR, attract talent and increase employment retention.



Healthier workplace

Increase day-to-day safety and comfort for employees and reduce annual sick leave



Enhance productivity

Team collaboration, thermal comfort, and design elements can increase employee contribution.



Sustainability

Reduce energy consumption across real estate and drive sustainability, innovation and growth strategies.



Distributed workforce

Smarter use of space results in lower real estate costs and can aid wellbeing.



Decreased operating expenses

Transform processes with digital applications and custom workflows.

Hybrid work – From Physical to Virtual

Organizations have become more flexible

End User Experience

As companies begin to expect employees to return to offices, it will be important to make the most of the end user experience.

Cooperation Interaction

Creating a meeting places where cooperation and interaction can thrive

Technology

Next-Gen Meetings — the convergence of voice, video and web conferencing into a unified experience — are easy to schedule, join, use and manage

We're seeing **three areas** of influence to improving employee experience



Human wellbeing

Change Management and Culture
driving choice and flexibility

HR



Facilities



Physical building

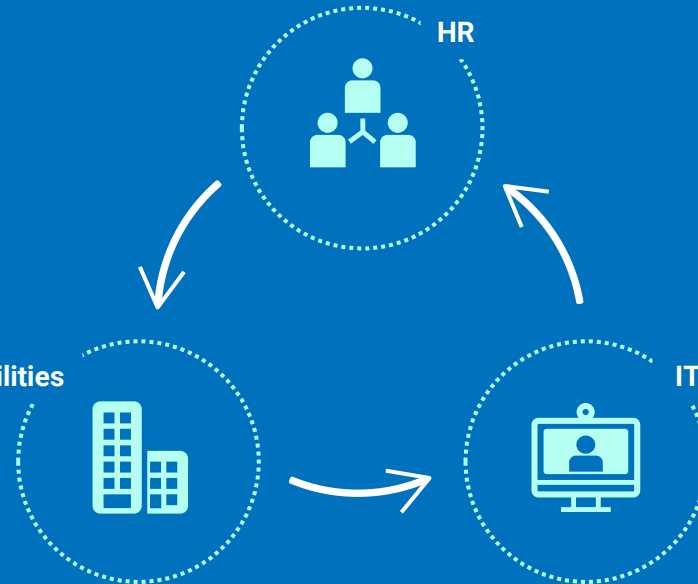
Use the environment to
build and live the brand and
attract and retain talent

IT



Technology

Activity Based Working
combined with technology
empowers people to safely
innovate and collaborate





Market Insights: Intelligent Workplace Report

1,350 interviews undertaken across 19 countries in 6 regions

Participants were decision-makers/influencers regarding the development of effective workplaces



Our Workplace research in numbers



Conducted by
Jigsaw Research
in August 2020

Respondent role

38.3% = C-suite
37.2% = Director/head of
26.5% = Manager/specialist

Functional area

HR: 30.9%
IT: 29.0%
C-suite (other): 16.3%
Ops: 11.9%
Facilities: 11.7%

Organization size

24.8% = 1,000-2,500
28.3% = 2,501-5,000
21.5% = 5,001-10,000
14.1% = 10,001-50,000
11.3% = 50,001+

from across 14 sectors, including:



Retail



Manufacturing



Financial services



Education



Healthcare and
pharmaceutical

The new workplace

	Pre-Covid	Covid-crisis	Post-Covid
Real estate	↓	↓	↓↓
Work From Home	↑	↑↑↑	↑↑
Flexible Office Use	↑	↓↓↓	↑↑
Office Purpose	All work types	Essential Tasks	Collaborate, Brainstorming Social, guests, on-the-job
Reliance on Workplace technologies	↑	↑↑	↑↑↑

Intelligent workplace

Why it matters now more than ever

Top ROI from workplace investments



Improved customer satisfaction



Improved revenues



Reduced costs

Top benefits to modernizing the workplace



1

Healthier workplace



2

Enhanced productivity



3

Improved employee experience (EX)



4

Improved business continuity

COVID-19 presents challenges, but also opportunity...

it's proving a catalyst to driving positive change

55%

of C-suite executives **strongly** agree that now is the time to create the **workplace of the future**; just 7% disagree

89%

of organizations recognize the value of **employee experience** as a crucial strategic differentiator, however, **just 38% are very satisfied** with their current capability

87%

of organizations say that the future workplace will be designed around **employee enablement**

5 top actions to workplace modernization



Remote/flexible
working policy



Digital
enablement



Home-office
workplace support



Workplace
wellness



Improved workplace
environmental factors

Digital transformation is being accelerated...

workplace modernization programs are being re-invented



Technology now appreciated as a key enabler to maintaining business operations

90%

organizations have become more reliant on technology since the start of the pandemic



Many organizations have succeeded in applying a quick-fix to their technology needs but have yet to formalize and confirm a future policy for sustained delivery;

But just, **45%**

of organizations strongly agree that employees have the necessary technology to work from home / remotely

Working remotely has been challenging for most

81%

of organizations agree
(37% strongly) that home
working
has challenged
organizational performance

79%

agree (38% strongly) that
home-working during the
pandemic has been
challenging for
employees

Productivity remained high as employees initially worked from home... but the research indicates that EX becomes harder to achieve without the benefit of face-to-face interactions

How to avoid stress and pressure

- Workspace
 - Need for a comfortable, dedicated workspace,
 - Ability to "close the home office door"
 - Impact of children & other disturbing elements
- Technology
 - Avoid issues with bandwidth and connectivity, make sure to have backup
 - Provide necessary training on the digital tools (read also best practices)
 - Guidance on how to manage overload of digital information
- Work/life balance
 - Much longer working hours
 - Much more difficulties for in dept (difficult) discussions
 - Feeling isolated from others

Now is the time to reshape strategies for long-term success

Will offices still exist as
we know them?

Will we return to what
was in place before?

What does 'office life as
normal' mean today?



The workplace is not an office – it's people

Employees would prefer to have the choice and flexibility to work in an office

89%

agree (45.3% strongly) that **face-to-face meeting time is essential** to build a sense of teamwork and/or when meeting clients

When safe,

75%

of employees would **prefer to work from an office** than from home (but desire levels diminish slightly with age)

86% of C-suite executives say their organization will return to office working; **35%** will expand flexible working arrangements

We're seeing a major change in how businesses look to operate

Ever-changing social distancing and lock-down regulations affecting office / facility planning

34%

of C-suite executives say their organizations are planning to reduce the number of permanent offices and/or physical space used;

however

24%

say their organizations are planning to increase the number of permanent offices and/or physical space used

Offices are being re-shaped to provide **collaborative environments** that facilitate **creativity** and drive **activity-based work** initiatives

45%

will advance video
conferencing/video
collaboration to better enable
flexible working

31%

Implementing additional
creative/thinking spaces

30%

will provide more planned
meeting spaces

27%

will reduce individual
desk space

just, **5%**

not re-shaping
their office space

Technology has run ahead to manage the critical aspects of business continuity; however, HR and IT policies, as well as compliance are yet to catch up

Currently, just **31%** have changed their IT policy



And only **29%** have changed their HR policy, to help employees work within a new operating model

60% of employees have increased the use of personal devices and applications which has rapidly increased the risk of security vulnerabilities.



In fact, only **46%** have increased their IT security capabilities to keep their organization and employees secure.

Just **42%** have access to workplace analytics to help them understand the EX and assess new pain points introduced by remote working

Digitization of the workplace must be secure by design, with cyber-resiliency built in



67%

of organizations are **finding it more difficult to spot IT security or business risk** brought about by employees when they are **working remotely**



83%

of organizations have **completely re-thought their security** to accommodate **new ways of working** brought about by the pandemic

Now is the time to rethink workplace strategies for long-term success

The optimization of EX will need to be a mixture of three elements

People and culture

Wellbeing
Empowerment
Flexibility
Choice

Technology

Which platforms and applications to use, and how to support them

Location

Home
Office (head office and satellite branches)
Coworking spaces

