

IDC Executive Brief

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Nathan Budd

Marta Fiorentini

Nabila Popal

Alexandros Stratis

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The Right Tools for the Job

The Need for Smart Accessories in a Transforming Workplace

Key Takeaways for Senior Management

Work environments are being adapted to maximize the benefits of mobility, new technologies, and digital capabilities. Only by supporting full workforce mobility can organizations address the demands of productivity, agility, and innovation, empowering staff to work without time, device, or space boundaries.

Equally, organizations that wish to recruit and retain the best talent need to look after their employees. This is only made possible by providing them with the right tools and technologies to perform and the right environments in which to share knowledge, collaborate, and engage customers.

"Work is no longer associated with a physical place or location, nor to strictly defined times of the day — it is now an activity that can be performed from anywhere, from any device, and at any time. Workspaces have to be redefined, and multiple configurations affecting the place of work, tools, and people, have to be created and refined while still ensuring the right level of collaboration among workers and of security for companies."

IDC Future of Work: Angela Salmeron, Mark Alexander Schulte, Gabriele Roberti (2017)

This Executive Brief, written by IDC and sponsored by Targus, demonstrates that while organizations mature in their digital and mobile transformation, many have not taken a comprehensive look at the impact that accessories — in the form of cases, security products, and docking stations — have on their business.

Introduction

This IDC Executive Brief tackles the key reasons for rethinking the role of accessories in the modern workplace and their impact on productivity. It is the culmination of a comprehensive research study conducted by IDC and sponsored by Targus EMEA. The 600-responder survey, targeted key decision makers from various industries, across lines of business and IT. Country-focus was the UK, Germany, France, and the Gulf Region (UAE and Saudi).

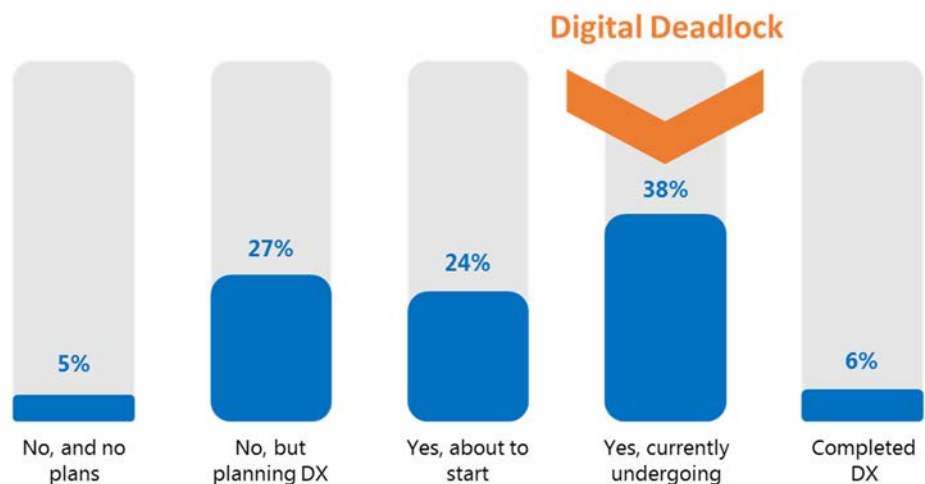
Respondents answered questions on their approach to mobility and digital transformation; the drivers and adoption of accessories; the impact of these within the workplace; and their approach to accessories moving forward.

Digital Transformation is Here, but it's Stalling

More and more organizations are in the process of digital transformation (DX). In fact, 95% of respondents were either planning or engaging in the application of digital technologies to create new business models, enhanced experiences, and improved financial performance.

DX requires a fundamental shift in the way organizations behave and are structured, the way in which they innovate new products and services, the way they define customer experience, and the way in which they engage employees and stakeholders.

Figure 1
Stages of Digital Transformation



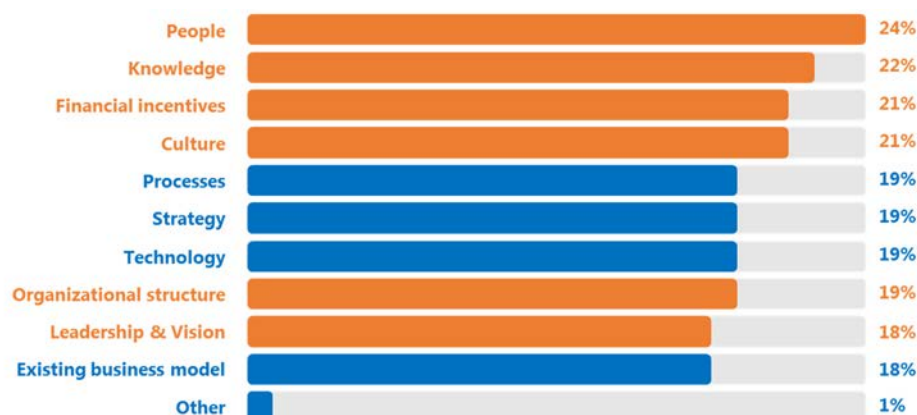
Source: IDC, *The Right Tools for the Job*, 2018

Figure 1 shows that 7 out of 10 of respondents in this study are about to start, are in the process of, or have completed DX. This is in line with wider IDC surveys, but increasingly, research is suggesting that many organizations have failed to realize its true benefits.

IDC refers to this as the "Digital Deadlock," where organizations have begun the process of DX, but are unable to achieve complete transformation. IDC has discovered that far from being about technology implementation and process alone, many organizations report people, knowledge, and culture as the issues of concern. This is outlined in Figure 2.

DX is stalling because organizations are failing to manage change. More specifically, they are failing to manage the impact such change is having on employees and the way they work, collaborate, and are motivated.

Figure 2
The Main Challenges to Delivering Digital Transformation



Source: IDC, *Digital Transformation Survey, 2017*

For organizations that have been successful in their DX efforts, employee engagement and organizational culture is not an afterthought, but part and parcel of a holistic approach. One of the fundamental elements of this is the creation and management of new ways of working.

Mobile Working Moves Beyond Mainstream

While mobile working may not be new, the extent of its impact is accelerating. Whereas once mobile working and the devices associated with this practice were the domain of executives, sales teams, and field workers, mobility now touches the entire organization, from accounting and finance, to delivery drivers, receptionists, and warehouse packers.

Equally, the use of mobile phones has exploded, bringing with it a range of new form factors, from tablets and smartphones to handheld devices and wearable technologies. Mobility is no longer simple. If it ever was.

Of the organizations surveyed by IDC, just 11% of the overall EMEA respondent-base stated that no one in their organization was mobile.

While the proportion of organizations' mobile workers has expanded, new ways of working have also emerged. This has encouraged organizations to rethink their approach to expensive and underutilized office space, increasing the trend towards hotdesking and remote working.

In fact, 23% of all respondents stated that hotdesking now accounted for between 10% and 25% of their employees' working environment. Not only does this drive cost savings and efficiencies, it also appeals to changing employee demands, flexible lifestyles, and the next generation of employees.

Mobile working is now mainstream and its contribution to wider transformation of the business is increasingly apparent.

Productivity Drives the Need for Transformation

When it comes to the key factors driving changes to the working environment, productivity is a central theme and was selected by 60% of the respondent base. In addition, the changing nature of business, the need to facilitate collaboration, and the retention of talent, are also key.

Figure 3
Key Factors Driving Changes in Working Environments



Source: IDC, *The Right Tools for the Job*, 2018

As above, the need for the right people to be retained in the organization is fundamental to successful DX. While 37% of all respondents selected this as a driver for changes to the working environment, this figure increases to 50% in organizations that had completed DX.

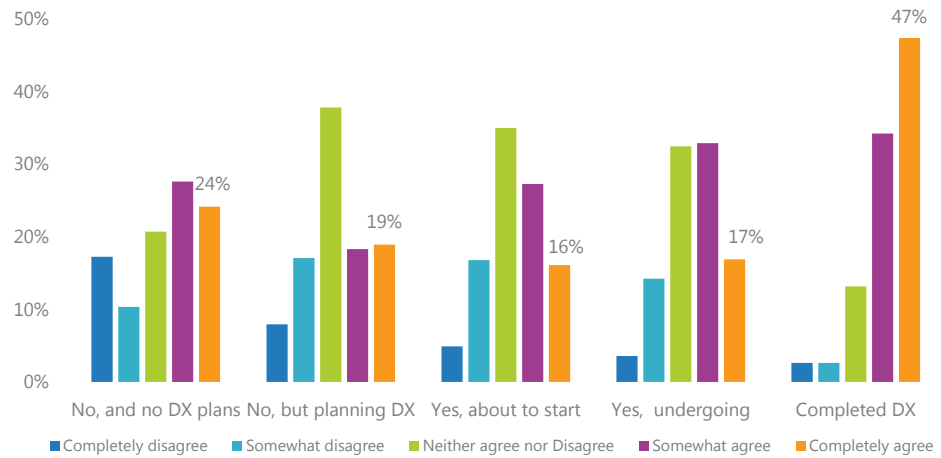
With productivity as a central theme for driving change (as well as the transformation of the business and the need to facilitate collaboration) the next question is whether the right tools and accessories have been adopted to deliver this?

Figure 4 shows the productivity value that respondents place on mobile working tools and accessories, as well as the productivity value of hot desking and collaboration.

Research shows an ambivalence within those planning DX or undergoing it, while much more value is placed on mobile working tools and accessories within organizations that have completed or are well into their transformation process.

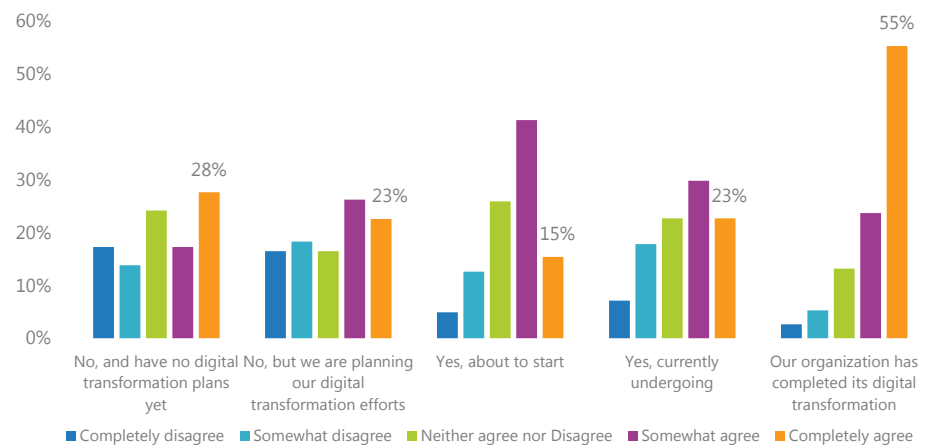
Figure 4
Productivity Value in Mobile Working Tools and Accessories

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Productivity Value in Hotdesking & Collaborative Tools and Accessories

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Source: IDC, *The Right Tools for the Job*, 2018

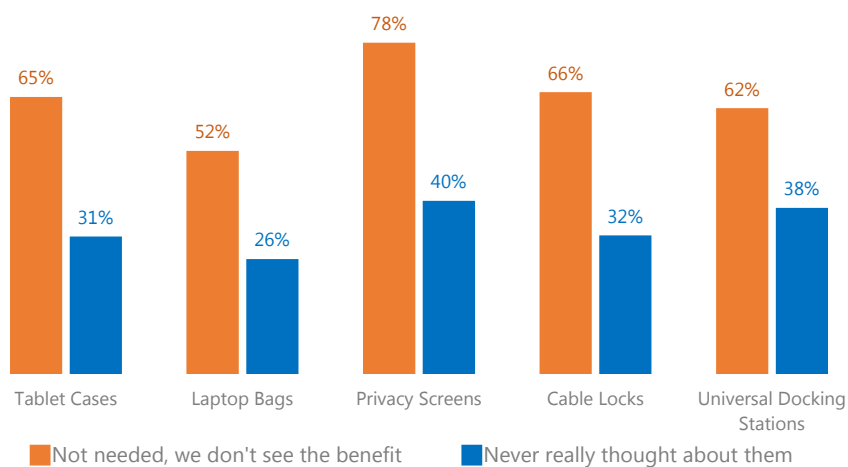
In fact, they see the productivity value of accessories both in mobile working *and* collaboration within office environments. On the most part, however, the approach and attitude to accessories in supporting new tools and ways of working is far from mature.

The Hidden Impact of Accessories on Productivity

For most organizations, accessories are simply not on the agenda, or are yet to be taken seriously. As outlined in Figure 5, over half of respondents stated that they were not needed or that they did not see the benefit in each area.

Equally, a large number also stated that they had "never really thought about" some of these accessories in terms of deploying them in the workplace.

Figure 5
Main Reasons for Not Deploying Accessories in the Workforce

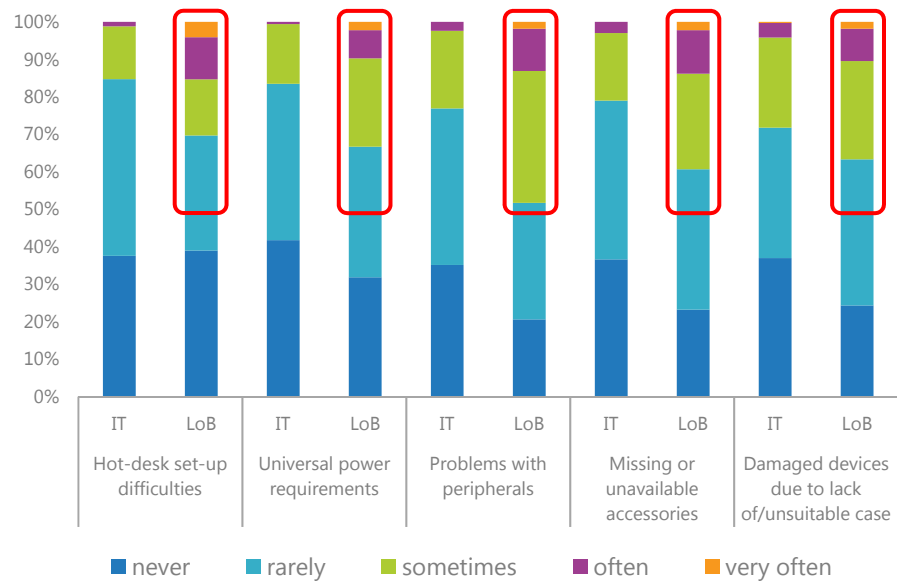


Source: IDC, *The Right Tools for the Job*, 2018

While the use of privacy screens and cable locks could be argued as specific to individual requirements, the need for solutions to protect and connect devices is fundamental to anyone working in an aspiring flexible environment. As a result, the question is whether these tools are genuinely not required, or whether those responsible do not place enough emphasis or consideration on their importance to a rapidly changing workforce.

One way of addressing this question is to look at the impact that poor accessory deployment is having on employee experience. Measurement of IT and line of business helpdesk inquiries, shows employees reporting higher levels of inquiries or complaints regarding power requirements, peripherals, missing accessories, and damaged devices due to lack of appropriate cases.

Figure 6
Percentage of Helpdesk Enquiries Related to Accessories



Source: IDC, *The Right Tools for the Job*, 2018

These are serious issues in isolation. Perhaps more important, however, is that far fewer issues are reported by IT respondents compared to lines of business. Concerns and complaints about accessories are less likely to be raised through official IT channels, but instead are communicated to managers and colleagues. Not only are these issues impacting productivity, they may also be creating negative workplace environments.

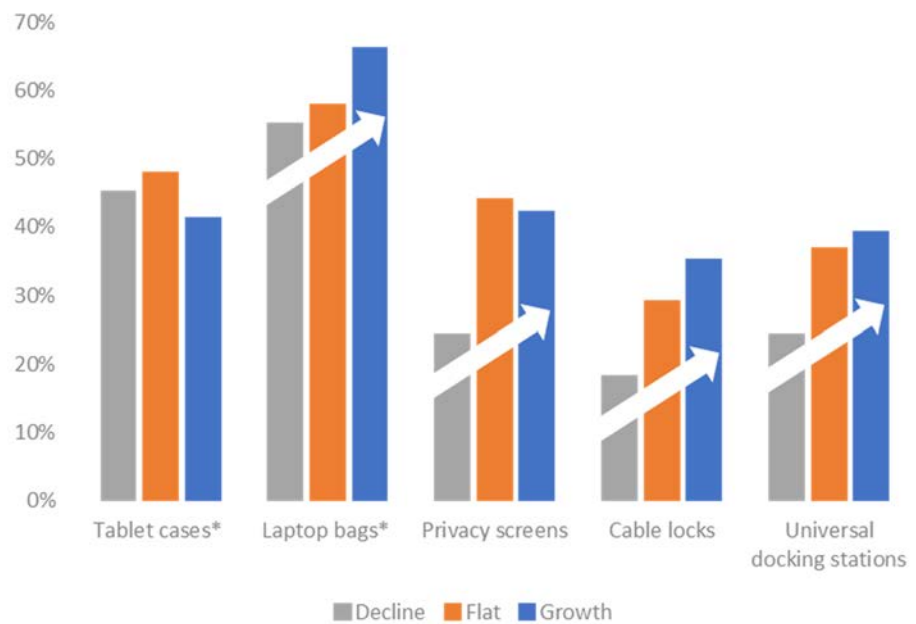
Research suggests that failure to provide accessories could inhibit, or worse nullify the benefits of new technologies and new ways of working and could have wider implication in the attraction and retention of talent.

At a basic level, this finding shows that IT departments, which could be responsible for accessory deployments, are detached from the experiences of those using them.

Organizations with Stronger Growth Deploy More Accessories

By asking respondents to indicate the growth their organizations experienced in the past year, as well as the provision of accessories to their employee base, IDC could plot the results in Figure 7. What is clear is that those organizations reporting growth also report higher levels of laptop bag, privacy screen, and universal docking station deployment.

Figure 7
The Deployment of Accessories by Revenue Growth Indicators



Source: IDC, *The Right Tools for the Job*, 2018

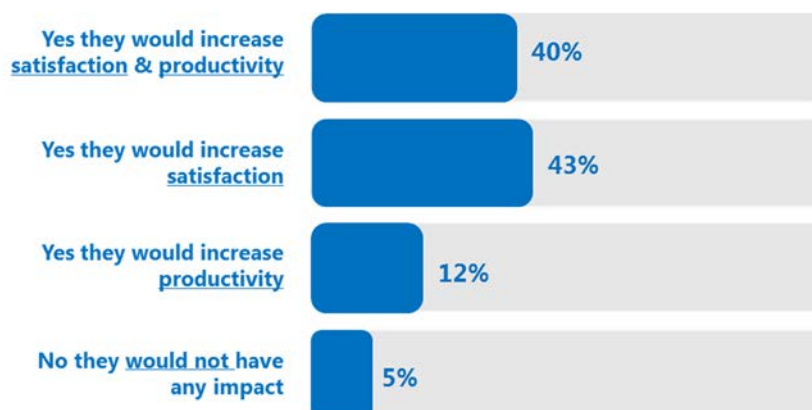
Accessories Will Drive Future Productivity and Satisfaction

With the changing workplace environment, mobile working and the pressure to realize digital transformation, many organizations are coming around to the need for tools and accessories to support this.

Evidence in the body of this Executive Brief suggests that progress may be slow, but when asked whether better technologies and accessories would increase the satisfaction and productivity of mobile workers inside and outside of the office, 95% of respondents agreed. As Figure 8 shows, this includes 40% agreeing that better technologies and accessories would increase both satisfaction *and* productivity in the workplace.

While this finding raises the question of whether they are deploying more accessories because they are growing, or growing because they are deploying more accessories; both outcomes are still significant. As a result, this approach should be emulated by any organization with aspirations for success.

Figure 8
Impact of Better Accessories on Satisfaction & Productivity



Source: IDC, *The Right Tools for the Job*, 2018

Perhaps the message is sinking in, but the reality is that many organizations need to rethink their approach to accessories and realize the role they play in both successful workplace *and* digital transformation.

Delivering Workspace and Business Transformation

For organizations in the process of or planning DX, workplace transformation, or simply mobile working strategies, understanding the associated impact on people and skills is key. As is taking a comprehensive look at accessories. IDC has defined five key takeaway messages to guide this process:

1. Transformation is a journey. It is continuous and all encompassing. Employees need to be highly involved and engaged in this process and feel part of both change and its impact. Ensuring they are supported through the right tools is key to delivering successful transformation and as a result agility, productivity, and innovation.
2. Frustrations around access to the right tools and ensuring they work is also fundamental. These marginal gains add up to make significant impacts on productivity. Moving people to hot desks that are not fit for purpose or fail to accommodate devices will kill transformation and impact change.
3. Remember that organizations that are digitally mature are realizing the benefits of comprehensive accessory deployments. This may be because accessories have aided change, but also because successful DX forces a rethink in attitude to accessories. Consider this best practice and emulate.
4. For too long, accessories have been an afterthought or have been left to others to decide. When thinking about workplace transformation, mobility, collaboration, and productivity objectives, take time to include and plan both devices and accessories together. For example, are the right docking

stations available for a mix of laptops and tablets? Are cases and bags appropriate and available to all? This includes placing discussions around accessories and mobility tools into the context of wider technology and transformation planning.

5. Attracting and retaining talent is increasingly crucial for organizations that wish to thrive in the digital age. Make sure that your working environment and policies have a positive impact on recruitment and retention, by offering accessories that are appropriate and fit for purpose. Placing the way employees work now and in the future at the center of this approach is the best way to address it.

"For organizations serious about delivering transformation, agility, productivity, and innovation, it's time to invest in the right tools for the job."

Nathan Budd, Senior Consulting Manager, IDC

IDC UK

5th Floor, Ealing Cross,
85 Uxbridge Road
London
W5 5TH, United Kingdom
44.208.987.7100
Twitter: @IDC
idc-community.com
www.idc.com

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Global Headquarters: 5 Speen Street Framingham, MA 01701
USA P.508.872.8200
F.508.935.4015 www.idc.com.

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