Hybrid workplace – any place, any device, any time

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With companies thriving on innovation, Orange Business Services places its customers at the heart of an open collaborative ecosystem. This includes its 27,000 employees, the assets and expertise of the Orange Group, its technology and business partners, and a pool of finely selected start-ups. More than 3,000 multinational enterprises, as well as two million professionals, companies and local communities in France, put their trust in Orange Business Services.

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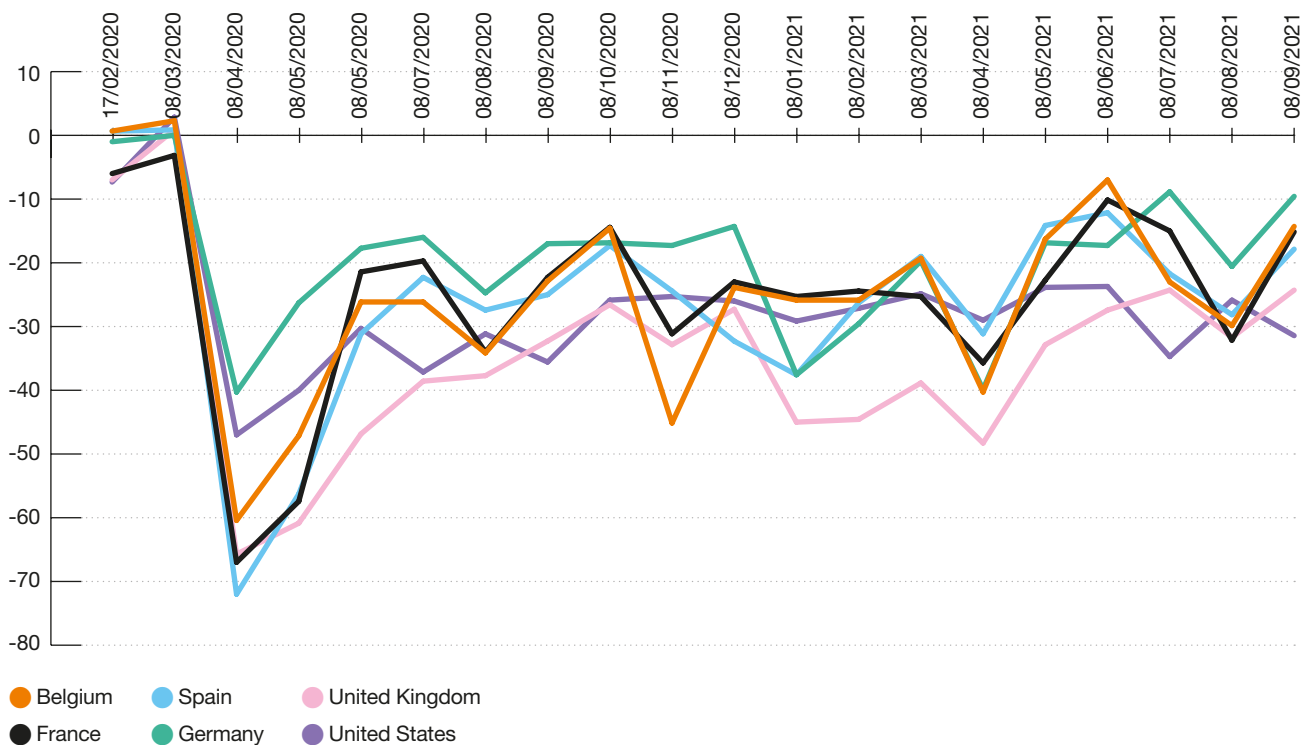in globaldatatechnology
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A hybrid workforce with complex demands

We are in a new era for the Digital Workplace. The question that faces Digital Workplace strategists are we ready for a radical shakeup of the way that we support our businesses?

With progress on vaccination rates, lockdowns are easing in many countries and workers are beginning to return to the office. However, even with the recent recovery workplace visits, for now at least, remain well below pre-pandemic levels.

## Changes in workplace visits (Feb 2020 – Sept 2021)

Legend:
- Belgium (orange)
- France (black)
- Spain (light blue)
- Germany (green)
- United Kingdom (pink)
- United States (purple)

Source: Google COVID-19 Mobility trends

Note: The data shows how visitors to (or time spent in) categorized places change compared to our baseline days. A baseline day represents a normal value for that day of the week. The baseline day is the median value from the 5 week period Jan 3 – Feb 6, 2020

The number of employees working from their official workplace reached a peak in March 2020. As of September 2021 this number was still significantly below that peak. It should be noted that these numbers include verticals (e.g., healthcare) where on-site working has remained relatively consistent – indicating a more significant drop off in other industries.

Workplaces: how did the number of employees going in to their workplace change since the beginning of the pandemic? (Sept 8, 2021)

This data shows how the number of visitors to workplaces has changed relative to the period before the pandemic.
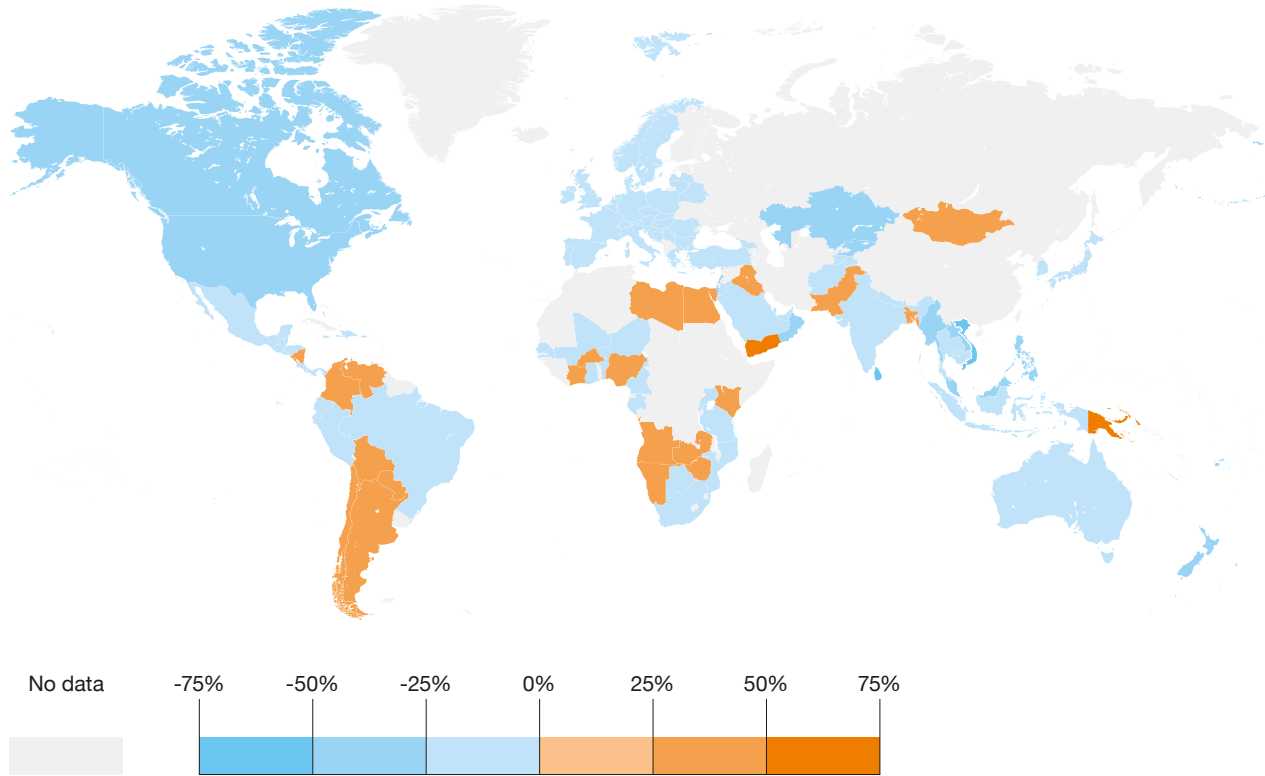
| No data | -75% | -50% | -25% | 0% | 25% | 50% | 75% |

This map highlights that the trend for hybrid working is consistent in developed markets across the globe. Businesses need to develop strategies that work in multiple geographies.

Economic activity is also rebounding as lockdowns ease and both business and consumer confidence recover. Consensus forecasts now indicate global GDP growth recovering to 4.9% in the current year, following the 3.7% decline recorded in 2020. Amongst the major economies, the US is expected to grow at 4.9% and Germany at 3.5%.

The strengthening economic outlook is well shown by the recovery in job prospects, with the new number of active hiring opportunities now well above pre-pandemic levels as economic activity rebounds.

Increase in hiring activity (January 2020 – August 2021)

Posted ● Closed ● Active
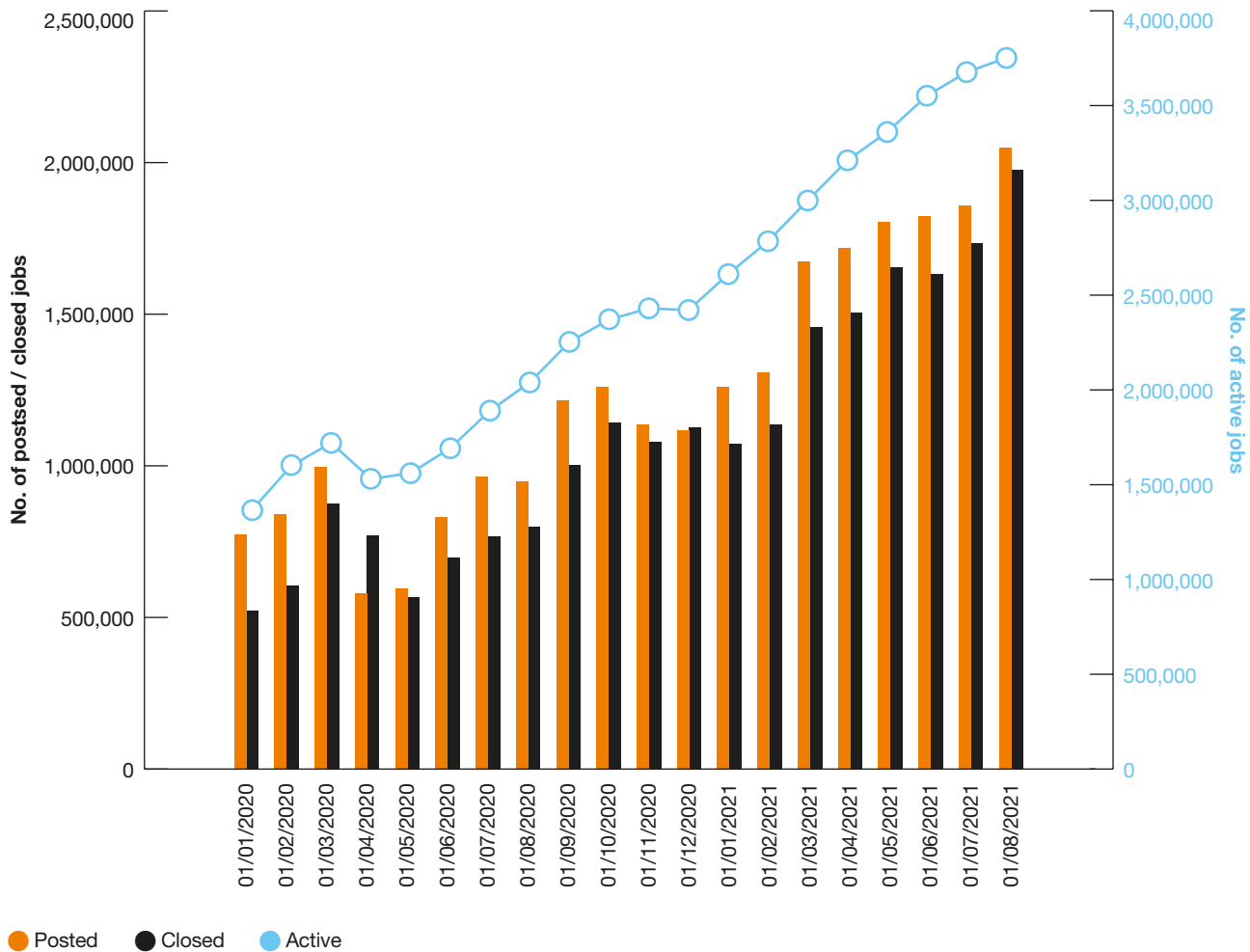
Source: Disruptor Intelligence Center / GlobalData

The battle for talent is intensifying as demand outstrips supply. The need for businesses to make themselves attractive to new employees with post-COVID expectations is clear.

However, many employees want more flexibility in their future work arrangements. The largest proportion of workers favour a hybrid model, with 28% hoping for a permanent shift to remote work.

Reflecting this, only 50% of staff expect to be back in the office within a 3-6 month period, even as more companies appear keen to get workers back into the office. 23% of staff do not expect to return and will continue to work remotely indefinitely. Confirmation of the new hybrid reality.

These various data points underline the various challenges that businesses face. On the one hand, the return to the office is accelerating, with more

employees already going to their workplaces than was the case for most of 2020, and 50% of staff expecting to be back in the office by early 2022.

By contrast, this leaves a large proportion of workers who are yet to return, many of whom will choose to continue to work remotely or make occasional visits to their workplace. Greater remote work has also delivered benefits, such as time and cost savings, and has proven its viability in people's own experiences. 44% of respondents have experienced a significant or slight increase in their productivity levels while working from home.

Few employees want to return to the office full time

**When lockdowns ease, if your employer lets you decide, would you prefer to:**

● Work remotely full time **(28%)**

● A mix of both **(45%)**

● Return to premises full time **(27%)**

Have you experienced a change in productivity levels during work from home?

Inclusion, efficiency and the employee experience should drive businesses' transformation strategies. Employees coming back to the office and those new to the office (especially the younger X & Y generations) expect flexibility, great tools and equipment in place to unleash their full potential and inspire a passion for the company. Your brand needs to be attractive to those employees you want to hire and keep, and the workspace is a big part of the story.

Many enterprises managed to accommodate the general shift to remote work while lockdowns were enforced in an effort to control the COVID-19 pandemic. Enterprises now need to support hybrid working environments with employees working from geographically diverse locations - at home, in the office, and on the move. The transformation journey to be made includes organizational changes and agreeing teleworking agreements. Training of employees and management and the redesigning of office spaces and meeting rooms to fit hybrid mode (e.g., shared desks, huddle rooms) are necessary to ensure a smooth transition.
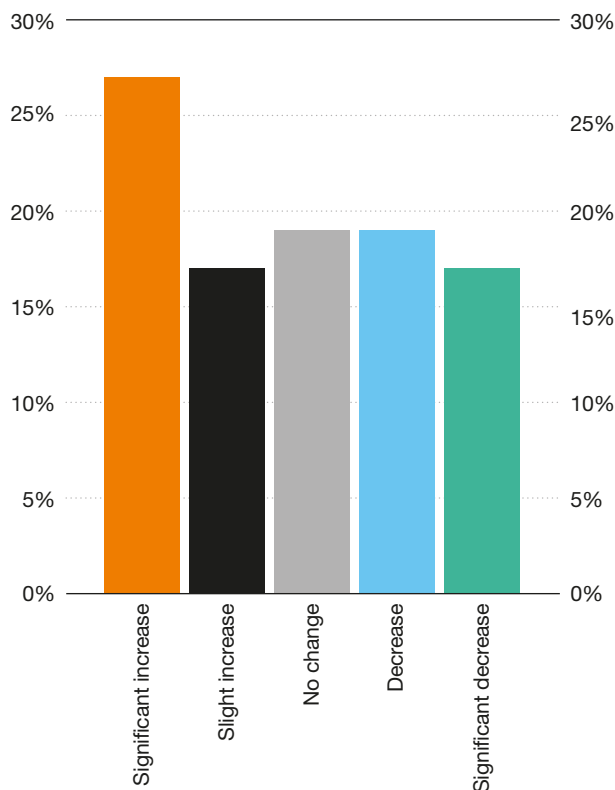
Ubiquitous broadband access, both wired and wireless and using whichever technology is the most appropriate in each location, is an absolute prerequisite. Workers must have the connectivity bandwidth to work efficiently.

Smart buildings are not a new feature but have moved now from being 'nice to have' to 'must have'. Many buildings are already equipped with a range of automation technologies and sensors, but there is still a need for these to be more integrated into connected systems.

This paper identifies the most pressing scenarios which businesses need to consider while preparing their workplace for the future of work, along with the role IT will play in meeting these requirements.

New situation, new approach for the digital workplace

Recent experience has underlined that a 'dancing landscape' of fast changing demands and requirements and new ways of working has emerged. This new world requires both fast thinking from businesses and the capability to deploy agile technologies in order to adjust to adjust to ever-changing market conditions, competitors, or the need to expand or contract.

Agile technologies should have the ability to securely deliver applications, data, and collaboration tools to a range of device types. They should also be delivered with increased levels of automation and user-centric support systems that do not rely on outdated service desk management systems.

The legacy approach of supporting a network attached to devices, image management, patching, distributing devices with three-year refresh cycles, and offering service desk tickets, will not cut it in the post-pandemic world.

Legacy concerns and associated infrastructure SLAs, such as platform updates, maintenance costs, security, and updates, are still relevant, but should now move to the background, or, even better, be paid for on a consumption basis, as an element of a service.

Enabling knowledge workers and inspiring creativity

The knowledge worker, with their objectives, ways of working and success should now become the focus for IT enablers, rather than the underpinning technology.

This approach requires a face-to-face dialogue with business leaders and knowledge workers. The key to design is understanding knowledge workers' objectives, success factors and pain points; giving them access to the data systems and tools that give them the freedom to create maximum value.

Organizations that are embracing the digital transformation journey are moving at a faster pace than before. These organizations acknowledge the importance and necessity of Digital Workspace technologies and the innovations and competitive value they create.

"Knowledge worker productivity is the biggest of the 21st Century management challenges."

Peter Drucker
**'Managing Challenges for the 21st Century'**
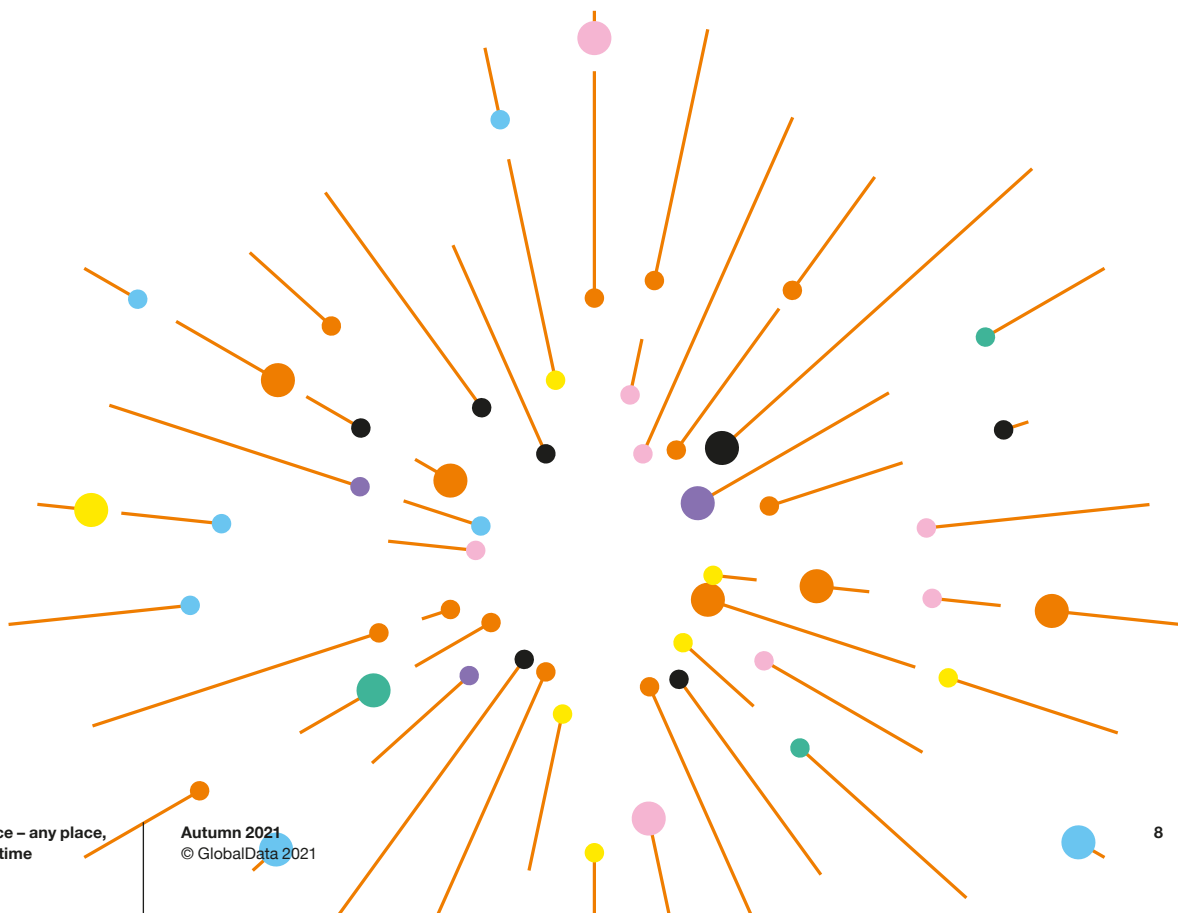
Employee experience comes first

Every company should strive to have satisfied employees. These workers, be they in logistics, operations, finance, sales, customer services, clinicians, strategists, or working in development, are the people whose efforts impact the bottom line.

The employee experience starts as soon as a job offer is accepted and progresses to the first-day onboarding process; it follows changes in the employee's job role or work-life balance, right through to off-boarding at the end of their time with the business. This end-to-end employee journey has a significant impact on recruitment and retention and helps to keep open the opportunity for re-employment of career-minded individuals.

The Digital Workspace contributes to employee satisfaction by making their workday more efficient. Today's applications are delivered from multiple sources or locations, but from the employees' experience this should be managed simply. A single sign-on or workplace portal can resolve this.

The ability to work from multiple locations can be streamlined by direct access across the internet. Older VPN-based connections attempt to extend the office network to the user, resulting in a cumbersome and difficult-to-manage user experience. A Zero Trust methodology allows secure connectivity directly across the internet, removing complexity and delivering a smoother user experience.
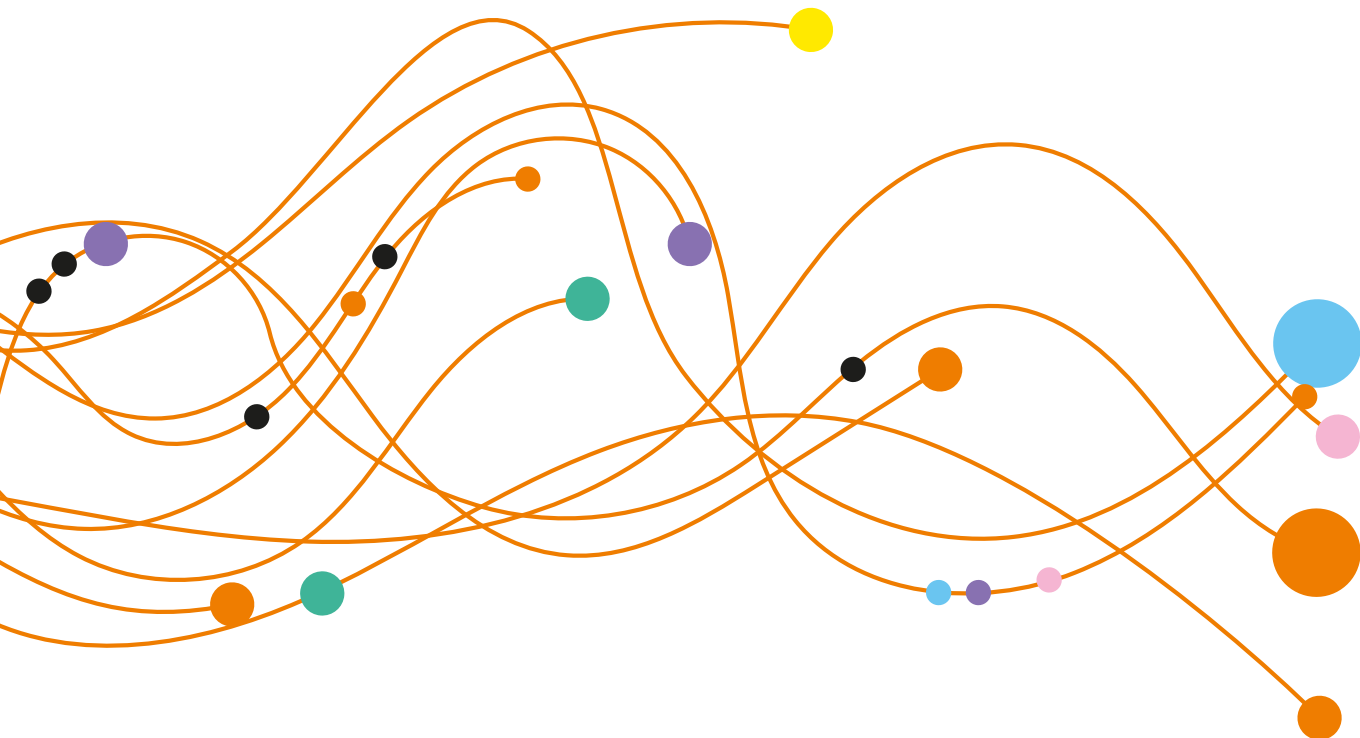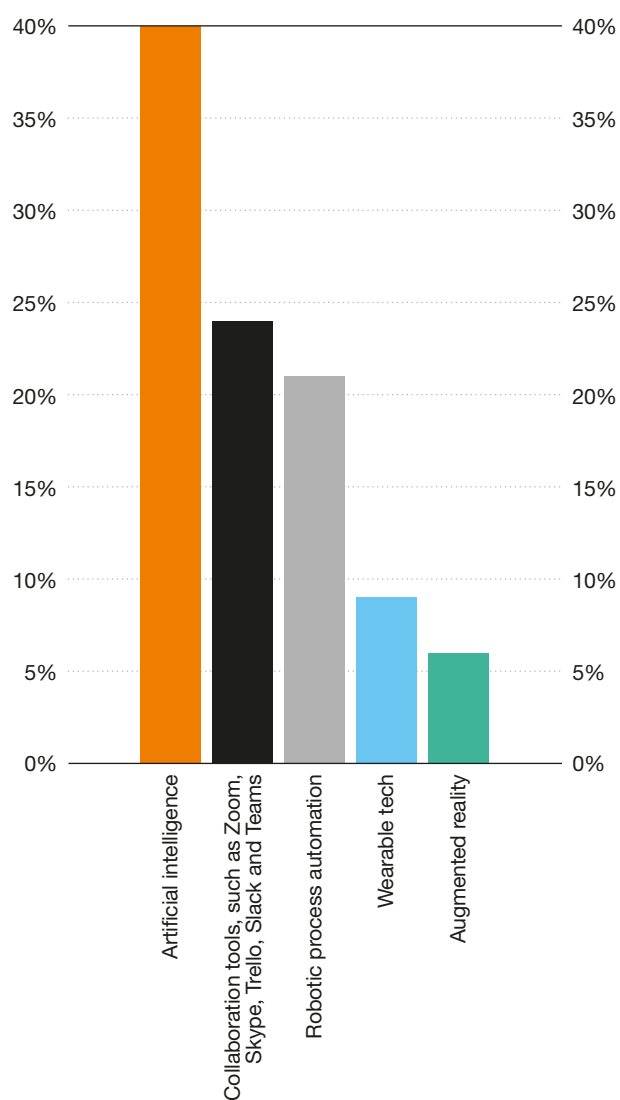
The future of collaboration

Team communication and collaboration, content management, and workflow automation are key to changing the future landscape of work. GlobalData's research has highlighted that collaboration tools are second only to AI in employees' minds when considering their future employment prospects. Collaboration and communications tools will play a defining role in both employee job satisfaction and delivering a next generation customer experience.

Key considerations for communications strategies include:

- Ensuring that collaboration tools are delivered as part of a wider digital transformation process, including the review of solutions delivered during the pandemic

- Using collaboration tools to support HR objectives – e.g., employee welfare

- Adapting to hybrid working and managing performance and quality wherever people work

- Delivering high quality and reliable voice services

- Enabling video as a customer contact/support/sales tool

- Empowering company-wide customer support by connecting collaboration and customer contact solutions

- Using AI to deliver maximum value from employee collaboration and customer engagements

Which technologies do you think will cause a change in the way you do your job over the next three years?
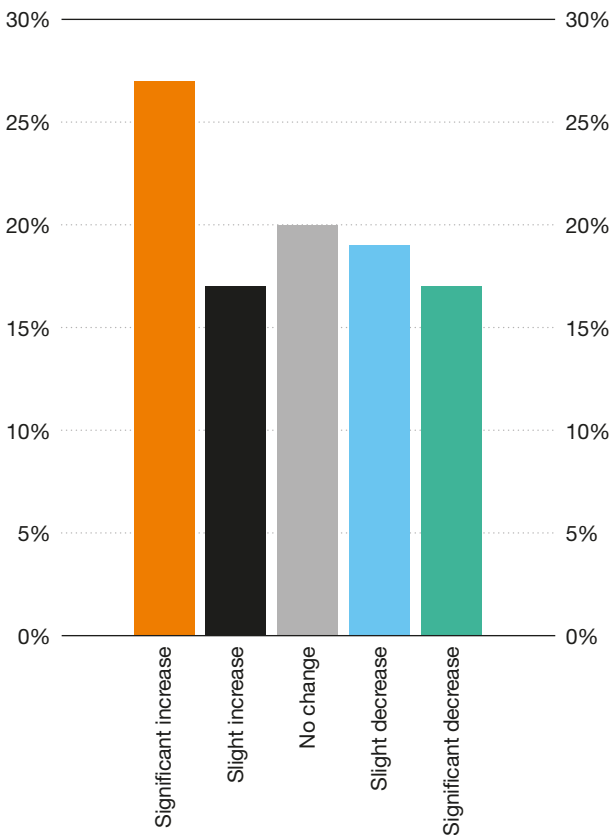

Source: GlobalData Analysis

Delivering productivity

COVID-19 presented many challenges, but enterprises were able to continue to do business thanks to the use of cloud-based collaboration services. However, the impact of collaboration tools wasn't merely to keep businesses functioning. GlobalData's research has revealed that 44% of businesses experienced an increase in productivity during the pandemic. Flexible working conditions and the absence of a daily commute played a part in this, but collaboration software was a keystone for this unexpected benefit. The opportunity is now open to businesses to build on these positive experiences as they develop their future of work solutions.

Have you experienced a change in productivity levels during work from home?

Video

Video has also become a mission-critical tool for both internal and external engagement. Enterprises should be aware, however, that user and customer expectations will rise, particularly when using video in service delivery and customer support scenarios. Video is an opportunity to transform the customer experience and explore new routes to market. It offers a powerful platform to develop commercial opportunities and gain deeper value from customer engagements. For full effect, video solutions should be integrated across both collaboration and customer contact solutions, reshaping the way agents interact with users for more personal and effective support.

Enterprises should consider how they can innovate with video solutions, with more tailored customer-facing video solutions enabling immersive 1:1 customer engagement. This needs to be considered alongside new office configurations. Existing video rooms will need to be integrated with collaboration platforms which may require external support, particularly for legacy solutions. New meeting spaces also need to be enabled for hybrid meetings that include remote attendees in the immersive experience.

Voice

The rise of new communication media such as video and chat cannot be ignored, but enterprises should remember that voice remains the preferred option for many high importance interactions – both internally and with customers and partners. The user and customer experience will be fundamentally weakened if a high-quality voice service is not consistently and reliably delivered. Enterprises need to engage with a provider that can offer a full range of proven voice solutions including SIP and direct routing services.

Integration

Merely deploying collaboration tools is not the end of the story. Integration is a key consideration for collaboration solutions to ensure that back-end staff and front-line, customer-facing employees are deeply connected.

Selecting a partner who can offer a range of platforms on a mix-and-match basis (e.g., one platform for team collaboration and another for contact center activities) may well deliver the best results. Multi-vendor solutions need to be integrated to deliver a joined-up user experience that avoids employees having to juggle with multiple systems. However, even single platform solutions will need to be integrated with business apps and hardware. A fully integrated solution extends customer service across an entire organization with one single, fully integrated digital workplace.

The need for integration extends beyond collaboration platforms into contact center platforms (see below) and corporate software such as customer relationship management (CRM) software, accounting, resource planning, and vertical specific applications. Bringing these components together should be viewed as part of a wider solution that enhances both employee (EX) and customer experience (CX).

Augmented with AI/ RPA/ Analytics

One of the most important rationales for companies when adopting AI is to improve their customer service. With the rise of AI, automation and analytics, companies are using data to improve their competitive advantage – resulting in the implementation of frictionless workflows and the creation of valuable business insights. When implemented well and in the right place, AI can also help organizations bridge gaps in their internal and go-to-market processes.

Now is the time to act as GlobalData's research highlights that in 2021 businesses have begun to wake up to the power of AI. The number of active jobs citing AI in Europe and North America increased by more than 50% between December 2020 and August 2021. Companies who are slow to react to this trend may find AI expertise harder to come by.

These powerful insights can best be achieved by working with a partner who can provide a service layer with strong consulting options and proven CX awareness. Applying the right expertise to AI-generated data enables organizations to understand their workflows and identify communication breakdowns, efficiency bottlenecks, or discrepancies in service delivery by analyzing the way employees interact via collaboration and customer contact services. Used in conjunction with CRM software, AI can help to deliver maximum value out of customer data and identify new sales opportunities. Features such as NLU/NLP (Natural Language Understanding and Processing) identify keywords in sales call transcripts, highlighting trends (like a spike in competitor mentions) or best practices on topics such as pricing discussions, and revealing gaps in the customer journey.

Artificial Intelligence (AI) Active Jobs
(December 2020 – August 2021)
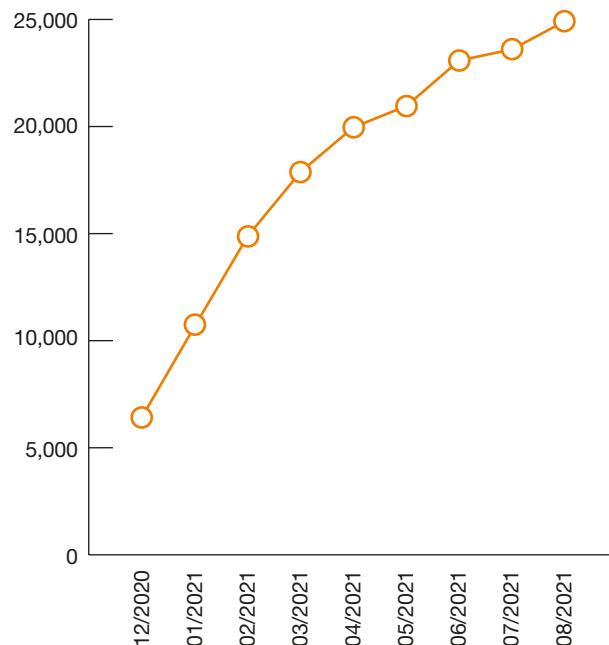
Source: GlobalData Job Analytics

Contact center

Many contact center staff are now returning to the office, but not all, and the pandemic highlighted that allowing staff to connect to contact center platforms remotely actually increased flexibility when dealing with peak demand. Businesses also need to be aware that the new generation of employees have their own expectations and expect a more flexible work life.

Older on-premises solutions often do not support a hybrid workforce environment and as a result, during the pandemic, many businesses were forced to very quickly engage in full or partial contact center platform cloud migrations. Migrations made in haste should not be considered as a 'job done', especially if they have not been fully integrated. Now is the time for businesses to see how a properly deployed cloud-based customer contact solution and deliver the agility that the new way of working demands.
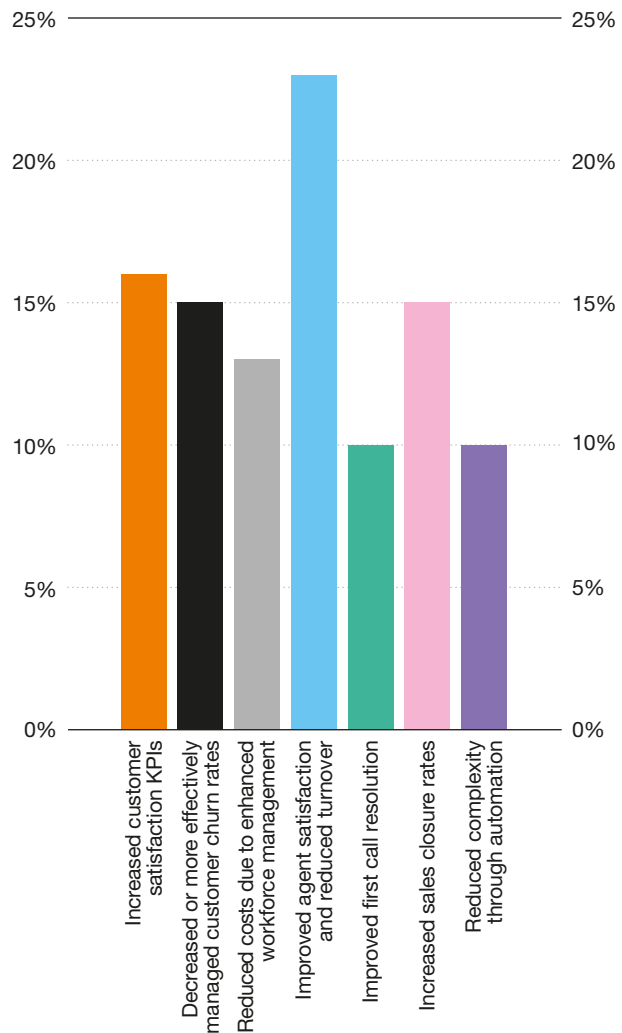
Collaboration + customer contact

Changing customer behavior, accelerated by the impact of COVID-19 lock downs, has seen a shift from physical to digital interactions which has resulted in an increased role of contact centers contributing to faster time-to-resolution, and higher levels of customer satisfaction. Contact centers should no longer be seen as only a cost center but should be considered more as a profit center which is key for business growth strategies. A key stage in the journey towards making contact center profit centers is connecting them to the rest of the business.

Linking contact center and collaboration solutions allows organizations to make more employees customer-facing without the need to invest in more contact center seat licenses. Linking

The benefits of AI in the contact center

Source: GlobalData Contact Center survey

contact center and collaboration solutions allows organizations to make more employees customer-facing without the need to invest in more contact center seat licenses. Integrated collaboration and customer contact solutions deliver more flexibility to assign new responsibilities to employees and, when needed, to connect people with the right expertise. When agents can rely on real-time support from experts, it improves FCR (first call resolution) percentages and reduces AHT (average handling time) – which impacts positively customer satisfaction. Similarly, integrating contact center platforms and CRM software ensures that agents are given the most up to date information which will play a vital role in improving sales and customer service scenarios. Agents who know that they can, when necessary, benefit from expert

guidance feel more confident to handle customer interactions: job satisfaction increases and agent performance is higher.

Inside the contact center, AI offers a huge range of benefits in terms of the customer experience, agent job satisfaction and adherence, and turning contact centers into revenue generators. AI tools reduce costs by improving efficiency through features like optimized customer call routing, and automated services such as chatbots/callbots and virtual agents. AI tools can also help human agents to identify sales opportunities when talking to customers.

Virtual agents can improve contact center agents job satisfaction by removing the most repetitive tasks (e.g., password resets, balance enquiries) and allowing human agents to focus on more complex calls. They can assist human agents during an interaction – providing real-time guidance through complex processes or next-best-actions. AI tools can also help contact center managers to monitor agent performance and welfare remotely – a particularly valuable tool when many agents continue to work from home. Similarly, they can enhance planning and more accurate and efficient forecasting and identify agent skill requirements.

"Integrated collaboration and customer contact solutions deliver more flexibility to assign new responsibilities to employees and, when needed, to connect people with the right expertise."

The future is pointing towards consumption based and agile digital workplaces

To deliver an agile digital workplace the Digital Strategists should have a rich selection of flexible solutions at their disposal. There are three key parts of this portfolio:

- Consumption based Hosted Desktops – which create secure workplaces for applications data and collaboration tools

- A workplace Portal – to simplify and improve user experience seamlessly connecting to application sources

- Consumptions based Devices – creating the ability to flex on monthly consumption

The design principle should be to deploy best of breed technologies aimed at simplifying and personalising support with a move, away from infrastructure SLAs towards Experience Level Agreements.

This approach should be underpinned with:

- Self Service Portals – so that users can resolve quickly basic requests

- Voice Support AI – so that automated processes can be triggered without service desk delays

- Personalised Product Adoption Services – to improve the use of software such as Microsoft Office 365

Together these components create a new and agile way of working for the Digital Workplace.

Underpinned by the consumption-based principle which allows organisations to quickly adapt to changing environments, support temporary staff, nearshoring, service centres organizations and allowing organizational structure changes in the most flexible and agile way
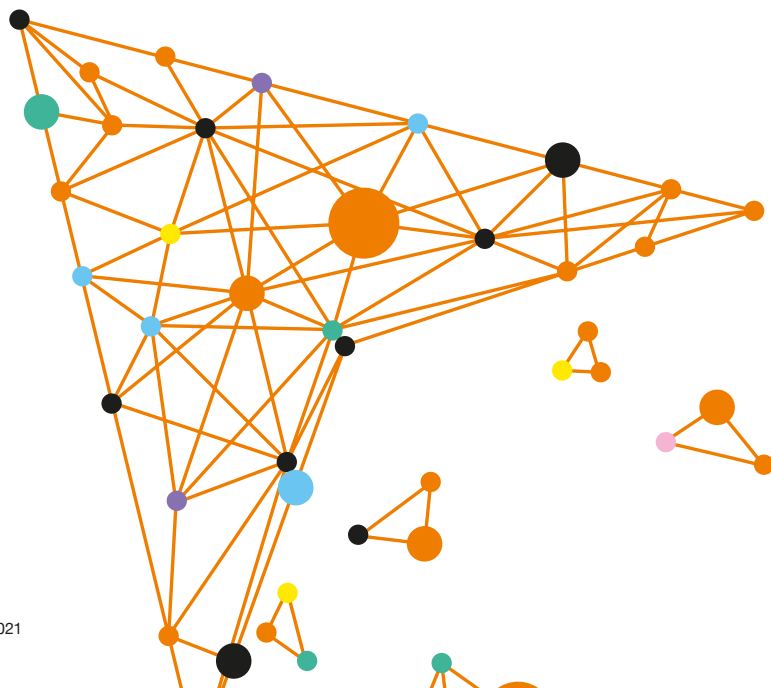
Connectivity & networks

The global pandemic has reemphasized the vital role networks and connectivity play enabling companies to operate and employees to work with the right tools. At the same time, cloud migration and hybrid working are placing new demands on corporate networks. Now is the time for businesses to reassess their network architecture, or risk delivering a poor user experience.

Key considerations for network and access strategies include:

- Auditing corporate networks to understand whether they can support new ways of working

- Ensuring that corporate networks have sufficient internet breakout capacity

- Ensuring a consistent experience regardless of where employees connect from

- Developing corporate networks that support a 'work from anywhere' methodology

- Securing more distributed network architectures with 'zero trust' policies

- Exploring the potential benefits of emerging access technologies such as 5G

Internet and VPN

GlobalData's research has highlighted that, from September, businesses expect at least 50% of their workforce will be returning to the office. These employees have been supported during the pandemic by accessing corporate applications and data over internet connections. However, pre-pandemic network solutions were not configured

to support large-scale internet breakout from corporate premises.

Insufficient internet capacity in corporate networks can lead to employees in the office encountering a worse experience than when working from home. VPN traffic routed to corporate internet breakouts will further contribute to overloading. In response, 67% of businesses have told GlobalData that they plan to upgrade their data connections in the next two years.

By when do you anticipate at least 50% of employees will return to the office?

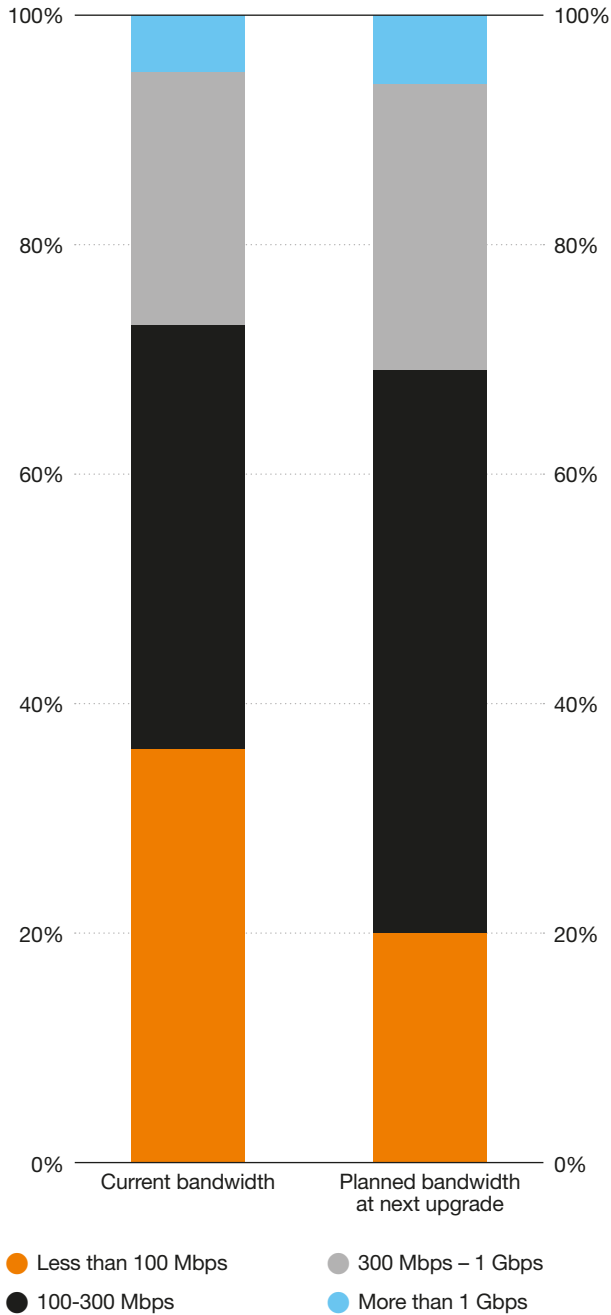- ● Within the next 3 months **(26%)**
- ● Within the next 6 months **(26%)**
- ● Next year **(24%)**
- ● Never / will continue to work remotely **(24%)**

Source: GlobalData Analysis
Note: Analysis based on 3,316 respondents received till 16 May 2021

Internet connectivity bandwidth

- 🟠 Less than 100 Mbps
- ⚫ 100-300 Mbps
- ⬜ 300 Mbps – 1 Gbps
- 🔵 More than 1 Gbps

Source: GlobalData Analysis
Note: Analysis based on 306 responses received till 31 July 2021

As employees return to the office, now is the time to act. Enterprises need to ensure that their network architecture and access services are configured to accommodate increased internet traffic.
Working with a provider with partnerships with multiple ISPs globally, the ability to manage services from multiple ISPs, and the technology to deliver enhanced security and visibility services over those connections is critical.
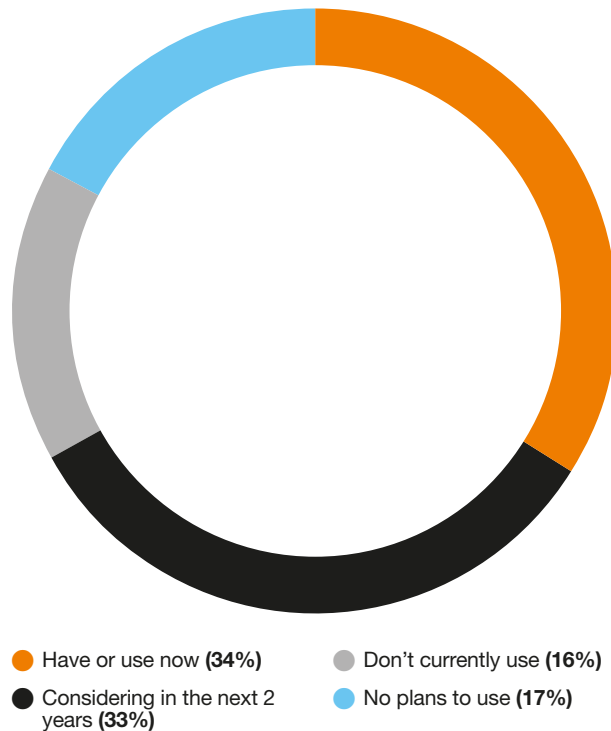
SD-WAN

SD-WAN is establishing itself as the de facto networking solution Research by GlobalData has shown that 34% of businesses are already benefitting from SD-WAN, whilst 33% of businesses plan to deploy the technology in the next 24 months.

The centralized, remote monitoring and management tools have enabled IT managers track vital network connections no matter where they are working. In addition, its in-built WAN optimization and application prioritization capabilities play a key role in enhancing the performance of internet connections and the services running over them. Enterprises should explore how SD-WAN can optimize corporate networks though dynamic routing and load balancing capabilities can ensure that internet connections/breakouts are not overwhelmed.

What are your investment plans for SD-WAN?

- 🟠 Have or use now **(34%)**
- ⚫ Considering in the next 2 years **(33%)**
- ⬜ Don't currently use **(16%)**
- 🔵 No plans to use **(17%)**

Source: GlobalData Analysis
Note: Analysis based on 4,364 responses received till 15 June 2021.

SASE/Zero trust

The combination of increased internet traffic and more employees working remotely also creates new challenges for network security. Concepts such as SASE and zero trust networking have emerged as network equipment vendors seek to address these security challenges. However, no single vendor can offer a full stack of both security and network capabilities. The reality is that most enterprises adopt a multi-vendor solution. The best results will be achieved by selecting a partner who works with a large number of vendors and can seamlessly integrate the different elements to create a secure-networking environment that does not prevent workers from being able to do their jobs.
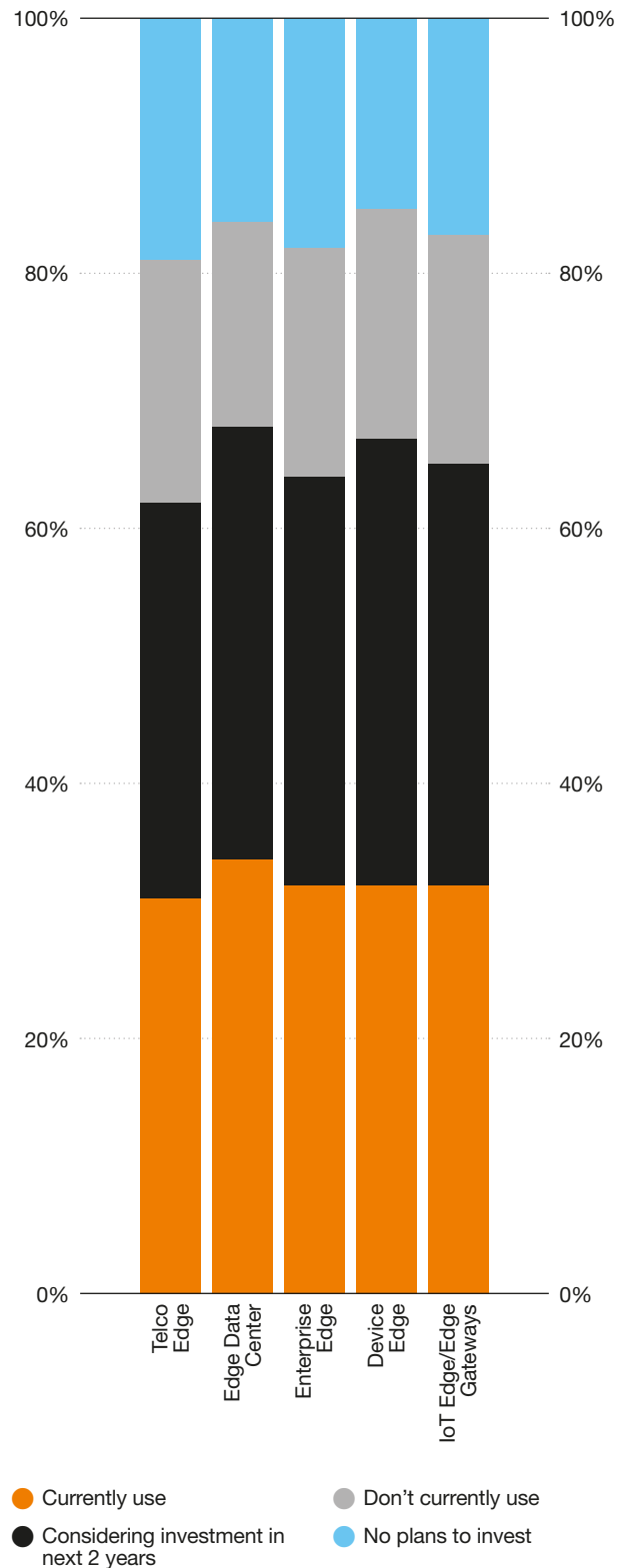
Edge networking

A technology that enterprises should consider as part a next generation networking solution is network edge technology. Over 60% of enterprises are already using or will invest in edge technology during the next two years according to GlobalData's research.

'Edge' encompasses a range of components and services. For example, edge-hosted internet scrubbing and DDoS mitigation solutions can help enterprises to increase the security of internet traffic whilst reducing the impact on bandwidth. Similarly, as applications move to the cloud, proximity hosting can reduce some of the challenges faced when moving latency sensitive applications to a hosted environment.

Which of the following do you currently use, and which are you prioritizing for investment in the next 2 years?

Legend:
- ● Currently use (orange)
- ● Considering investment in next 2 years (black)
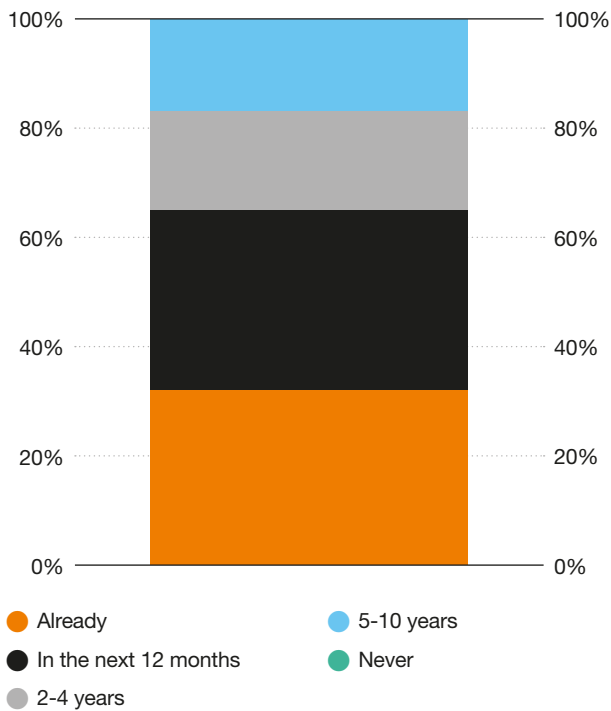- ● Don't currently use (grey)
- ● No plans to invest (blue)

5G

The evolution of network services will also include a greater role for mobile access services. GlobalData's research highlights that 50% of businesses believe that 5G will play a disruptive role in their industry in the next 12 months.

5G promises to enable faster work and to switch more seamlessly from one mode and location to another. The adoption of 5G will open the door for companies in a variety of industries to take advantage of higher-quality/ lower-latency collaboration tools (particularly video), remote diagnostics of installed equipment, and AR-based safety training solutions. Companies should also consider how 5G can allow frontline workers to access the applications, collaborations tools, information, and expertise they need to be effective in the field. 5G also offers options for enterprises as a back-up or load balancing feature on top of fixed-line connectivity, and can be user to deliver a wire-free working environment.

When will 5G start to disrupt your industry?

- 🟠 Already
- ⚫ In the next 12 months
- ⬜ 2-4 years
- 🔵 5-10 years
- 🟢 Never

Source: GlobalData Analysis
Note: Analysis based on 362 responses received till 15 July 2021

LAN and Wi-Fi

As offices are reconfigured, strong LAN and Wi-Fi services are critical in supporting employees who are hot desking and/or moving between meeting/ huddle rooms. The de facto standard for in-building networking will, in most instances, continue to be Wi-Fi. As Wi-Fi 6 matures, it will be the primary way to connect assets/devices and support employee communications. However, LAN, like WAN, is evolving to be more software-driven and this SD-LAN technology will support a best fit methodology integrating multiple technologies in a single LAN domain. Technologies such as 5G and IoT are blurring the traditional distinctions between the WAN and the LAN and need to be integrated into LAN strategies.

"5G and IoT are blurring the traditional distinctions between the WAN and the LAN"

Conclusion

Hybrid workplace – any place, any device, any time
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Every announcement from a major multinational company or tech giant about a permanent switch to a hybrid or fully remote working model makes it clear that things will never be the same again. The changing dynamics of the modern workplace and the ever-expanding range of new technologies available can seem overwhelming. But businesses should see the workplace of the future as an opportunity and a call to action. Now is a time when businesses can redefine themselves as employers ready to provide the ideal environment for the next generation of talent.

And help is available. The right solution provider can guide enterprises through a digital transformation process and help businesses understand which solutions offer the best fit for their vision for a future proof employee and customer experience journey. A solution provider who can help businesses to integrate new collaboration and customer contact solutions with high quality voice and video communications, supported by a cloud enabled network and an intelligent AI layer, can allow businesses to deliver changes that make a difference.

Orange Business Services, your partner for creating great employee and customer experiences.

Wherever you stand in your workplace transformation journey, we are here to make it as smooth, productive and future proof as possible.

What sets us apart?

Our technical prowess as a network operator, coupled with our agility as an integrator of digital solutions

- Operator: building and operating complex infrastructures
- Integrator: designing and managing end-to-end digital solutions

27,000+ expert staff in B2B operations: we put their specialist skill sets to work for you

- 3000+ multinational clients
- 6,000+ IT experts including Data and Artificial Intelligence, IoT, cloud and cyberdefense experts
- Customer service teams and CyberSOCs located around the world to provide 24/7 support to all of our customers

For more details visit:

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