

The digital workspace is transforming to improve the employee experience and create a more productive, innovative workforce. Digital workplace services (i.e., advanced help desk or service desk) and device as a service seek to leverage these same methodologies but instead focus on a company's employees, engaging with them like customers.

How IT Redefines Workplace Services

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Introduction: Redefining the Modern Workplace

The needs of employees, in particular the needs of remote workers, are rapidly evolving. Employees expect a seamless IT experience, and they need technology that can help them do their job without interruption, enabling them to achieve their goals and objectives. In an April 2020 study conducted by IDC during the COVID-19 crisis, nearly 60% of respondents stated that they will be investing in secure remote access capabilities and 45% of respondents stated that they will be investing in endpoint device management tools due to the changing needs in today's environment.

Creating a modern workplace is about making employees more productive and providing a better user experience (UX). While this goal may seem easy to obtain, IT industry veterans can vouch that, in the not so distant past, the single directive of the IT department was to decrease costs. Today, being able to provide secure remote access to corporate data and to provide support to employees remotely is a top priority, driving more investment in understanding employee needs. Investing in IT device management will help IT with the tools to make this a possibility.

Why are employees expecting more rapid, frictionless interactions with IT today? Because technology is pervasive in everyone's life, and experiences as consumers are impacting expectations as employees in the workplace. In both their personal lives and professional roles, people expect easy and immediate access to resources — whether at work, traveling, or at home. Technology is inextricably linked to the overall employee experience, creating the need for IT organizations to develop a strategy to transform the digital workplace.

Thus far, most digital transformation initiatives have been by organizations seeking to transform the user experience. DoorDash and Uber are good examples of companies leveraging digital technologies such as analytics, Internet of Things (IoT), and UX design to create new customer experiences. These changes are focused on external customers. The transformation of the digital workspace is focused internally to improve the employee experience and create a more productive, innovative workforce. Digital workplace services (better known as help desk or service desk) seek to leverage these same methodologies but instead focus on a company's employees, engaging with them like customers. This IDC Vendor Spotlight seeks to provide a holistic overview of this new services market segment by focusing on three main sections:

1. What underlying market changes created the demand for a modern/remote workplace?
2. What are the main types of digital workplace services employees will see, and how will they change their workstyle?
3. What back-end transformations must employers make to enable them to implement a modern workplace effectively?

AT A GLANCE

KEY STATS

- » 85% of enterprises want to work with a vendor that has robust service offerings.
- » Nearly 60% of companies surveyed during the COVID-19 crisis stated that they will be investing in secure remote access capabilities.

Definitions

- » **Digital workplace services.** These services are provided to transform and modernize how IT is delivered in the workplace. Key attributes are rapid and secure remote delivery of role-based, personalized IT service, similar to how a consumer would receive support. Digital workplace services provide employees with the applications, data, connectivity, and collaboration tools necessary on any device, anytime, and in any location. Key characteristics are the ability to allow the employee to choose the channel of that interaction and the ability to create an efficient and flexible process for enabling the employee to use technology in the workplace whether remote or on-premises.
- » **Service providers.** In the context of this IDC Vendor Spotlight, "service providers" are vendors that deliver digital workplace services.

Key Trends and Drivers

What Underlying Market Changes Created the Demand for Digital Workplace Services?

Employees expect a frictionless experience with IT. Companies are motivated to find ways to attract and retain top talent, and more mature organizations understand the critical role that technology and hardware support play in this effort. Hardware support has evolved in response to market changes, mostly digital transformation and customer experience. As an integral part of this transformation, digital workspace services are now more complex. This section explores the forces driving change and the challenges organizations face.

Generational Changes in the Workforce

Millennials are a large portion of the labor force made up of individuals who have never existed in a noncloud, disconnected world, and their expectations for frictionless technology are very different from those of baby boomers (workers age 55+) and to a lesser extent Gen Xers. In today's environment, we will still need to be cognizant of the needs of all users no matter how they differ.

Newer generations of employees have different ways of evaluating their job satisfaction. In the past, money was the primary driving factor to job satisfaction, but millennials are placing importance on how a job impacts their lifestyle. They want the ability to work remotely, and employers are beginning to realize that millennials view their job in a fundamentally different way than previous generations, and digital workplace services can help employers evolve their culture to capitalize on this shift. IDC is seeing this shift accelerate due to the COVID-19 pandemic, with 54% of enterprises increasing their demand for mobile devices.

Changing Labor Productivity Growth

Despite huge IT advances in recent years, labor productivity growth has remained very flat at 0.7% (according to the U.S. Bureau of Labor Statistics). Many economists colloquially refer to this flat growth as the productivity paradox and offer a variety of theories on why this is happening. The most accepted current theory is that there is a lag between the creation of IT and the impact of IT on employee productivity. Corporate financial statements are starting to reflect this, with a recent finding that retail businesses with digitally capable workforces were able to provide \$300,000 more revenue on average than retail businesses focused on brick and mortar. Employers are turning to digital workplace services as the catalyst that can help them improve their labor productivity.

Keeping Up with the Jones' Shift in End-User Expectations

User experience has been defined by consumer applications from pioneers such as Uber and DoorDash. Users of these services expect to achieve their desired outcome within minutes of opening their smartphone. These expectations are beginning to bleed over into other areas of consumers' lives so that when consumers need their PC to be deployed or repaired, they will justifiably wonder why it takes their employer multiple business days to get their laptop in working condition.

HP advanced support and "walk-up centers" or other walk-in models are a closely related trend, giving employees the ability to discuss any questions they might have regarding their products and resolve issues quickly, in addition to hosting workshops that help users be more productive in using their technology. Employers are realizing that they need to provide consumer-grade user experience to their employees, or they risk losing out on top-level talent to organizations that will provide this kind of experience. The ability to provide effective digital workplace services has become a competitive differentiator.

Drive for Employers to Get More Value from Their Hardware and Software Investments

Cloud was revolutionary in allowing employers to decrease the cost of their hardware infrastructure by paying for only the hardware they use at a given time rather than paying a fixed fee for peak demand capacity. Now that many employers have realized cost savings from cloud substitution, they are looking at other parts of their IT landscape to see where they can generate savings.

PCs and software are the next targets; many employers have spent huge amounts of money implementing systems and the software employees use such as SAP, Salesforce, and Office 365, yet they don't feel they are fully utilizing the true capability of these platforms. IDC has also encountered enterprises losing track of thousands of company-owned assets that never made it back for proper dispositions. Digital workplace services can help employers take full advantage of their existing hardware and software investments.

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Digital Workplace Service Offerings

While the previous section detailed the underlying market changes that have created the demand for digital workplace services, the next three sections focus on describing the offerings that digital workplace service providers are offering to their customers and what it will look like from an end user's point of view.

Personalized Services

Employers must create profiles that segment their employees into similar groupings so that they can better service everyone within that group. Offerings such as accidental protection services, which may include onsite repair/delivery or setup for devices while an executive is traveling, are the types of services IT should be able to offer. Also, for example, when providing tech support, knowing whether the end user is a programmer or a salesperson should impact the type of service you provide. The level of technical jargon that can be used in a resolution can go much deeper when dealing with the former (programmer) but needs to be much more general when dealing with the latter (salesperson). Having this context so that each interaction is tailored to the individual is a key factor in ensuring that each employee's experience is positive. This gets to the core of digital workplace services treating employees like customers.

Beyond just customizing services, employers should also look to move to choose-your-own-device (CYOD) policies as it further improves employee satisfaction by allowing them to choose which ecosystem they feel most comfortable in, whether iOS, Windows, Linux, or Android. If CYOD is the enterprise's choice, then having detailed deployment and, more importantly, configuration plans will be critical. Having the right, preconfigured images and applications on the device and delivered to the user in a reasonable amount of time will be paramount. It is important to look internally at your IT organization abilities and see where help is needed around imaging, labeling, and tagging as well as other configuration and deployment services. "Outsourcing" these services can greatly reduce onsite resources; most enterprises outsource some or all of these features and the others mentioned below.

Single Point of Engagement

In the past, organizational barriers often led to frustrating situations where a customer had to call multiple departments to achieve different objectives. Ending an interaction with, "You'll have to call a different department; I don't have that information on my system" was a common source of frustration, as customers felt that any interaction with an organization should be able to handle any customer request. Thankfully, digital transformation has made these types of interactions increasingly rare in the business-to-consumer (B2C) space. However, this problem is still a common source of frustration for employees when dealing with their IT departments. By continuing with the central theme of digital workplace services treating employees like customers, IT departments are increasingly looking to have a single point of engagement with their employees. This single point of interaction needs to be multimodal to handle requests spanning multiple corporate functions, such as support of an asset or a software package.

Knowledge Management

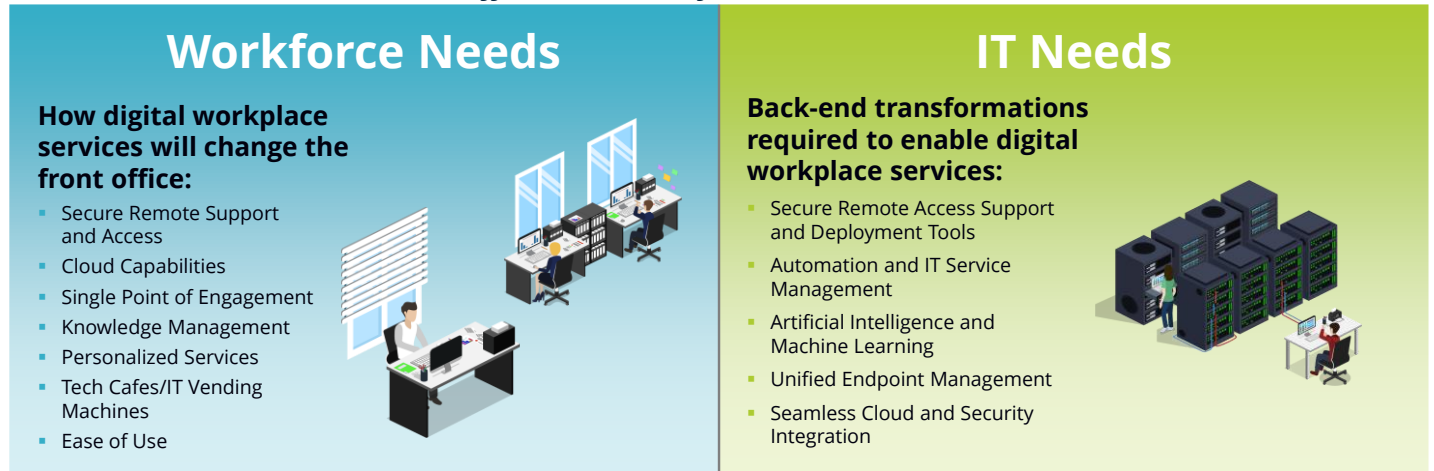
Knowledge management is enabled by a data lake that captures all the information created through interactions between the employee and the employer. This goes beyond capturing just textual data within service desk tickets; it also has to include many other pieces of contextual information, such as which channel the employee used to interact, where the problem occurred (via IoT sensors), and sentiment analysis of the employee's current mood. These serve as a few examples, but there is an almost limitless amount of data that can be captured and subsequently acted upon. This data set can then be leveraged to help diagnose the root cause of reoccurring issues, which allows for prevention and self-healing.

Another common source of frustration employees have when dealing with their employers is when they have to explain their problem to each person they interact with. As the issue is passed around to different departments, each person requires the employee to explain what his/her problem is, only to pass the employee to someone else and start the cycle all over again. Real-time knowledge management systems alleviate this problem by having all the information uploaded to a centralized data lake, which can be viewed by everyone in the value chain. The result is less time spent by employees having to repeat their issues and more time for employers to fix the underlying problems and get the employees back to being productive.

Digital Workplace Services: Back-End Transformations

The final section looks at digital workplace services from the employer's point of view — more specifically, the back-end transformations the employer must go through to enable digital workplace services. Figure 1 provides an overview of how these two types of services are structured.

FIGURE 1: *How Front and Back Offices Are Transformed*



Current demands by companies stress the need around the remote worker and devices.

Mobile Devices and Endpoint Security



Secure Remote Access



Source: IDC, 2020

Onsite and Proactive Support

According to a recent IDC study, the technical support engineer's ability and communications skills topped the list of what customers were looking for in their support experience, followed closely by proactive support. IDC then had conversations with those customers on proactive support, and they stated it was not just the technical proactive abilities of notifying an IT manager when a drive is failing but also the ability to have a conversation in a proactive manner on what they should be doing in the environment. Proactive support can include using data and analytics to make suggestions on procuring new laptops for engineering or enabling a kiosk area for mobile users. These are the duties of technical account managers or someone in the vendor's organization who completely understands the enterprise's business needs from both an IT technical perspective and an end-user needs and wants perspective. Other key support features customers focused on were easy access to patching and updates as well as being able to provide software support. The endgame is to create an environment where the end user is happy and more productive.

Artificial Intelligence and Machine Learning

Artificial intelligence (AI) and machine learning (ML) are fundamentally changing IT services. The capabilities around AI and ML are perhaps the most important for employers to have, but they come at the cost of getting everything connected, collecting the data, synthesizing the data, and then intelligently acting upon the data. If digital workplace services are about treating employees like customers, and digital-native organizations have been successful, then employers must gain these same capabilities if they want to delight their employees and ultimately make them more productive. However, AI and ML capacities are required for more than just understanding employees; they are also required for doing trend analysis on data gathered within knowledge management systems. At a basic level, they can spot problems before they arise so that incidents can be avoided before they happen. Though the potential use cases are even greater, AI and ML could be used to find opportunities for efficiency gains in areas of the organization that are simply too large for a single human to analyze.

Mobile Support

Digital workplace services are about having a single interface between the employee and the employer and allowing the employee to choose the channel of that interaction. If employers have separate policies and processes for interactions conducted on a mobile device and for those conducted on a PC, they no longer have a single point of interaction. Employees want to be able to run any workload on any device in any location, and unified endpoint management enables that. One of the most critical services an enterprise can provide for mobile workers is the ease of onboarding; IDC cannot stress enough how companies must invest in deployment capabilities.

Device Security and Cloud Integration

This document thus far has refrained from mentioning cloud or security, not because they are unimportant but because they are so important, they should be considered foundational "table stakes" within the digital workplace services domain. Cloud and cloud management, especially for remote workers, have become so pervasive, and security threats so worrisome, that employers expect any solution will have cloud and security interwoven into every solution they provide. Having cloud and security capabilities isn't a differentiating factor because employers see it as a must-have; however, not having cloud and security capabilities built into digital workplace solutions will result in the service provider not being invited to the request for proposal (RFP).

Considering HP Services as a Technology Partner

Having the right partner to deliver a seamless experience to employees is now crucial. Companies cannot afford to have their IT teams tied up in activities such as daily device management at the expense of innovation and projects that are more strategic to success. HP Services offers the following choices and flexibility in a modular offering:

- » **Lifecycle Services.** Equipping employees with the right technology is a top priority. HP Lifecycle Services supports IT staff by helping improve the way employees work so that they feel happy, productive, and engaged. HP manages devices and fleets from configuration and deployment to repurposing and renewing them at end of life. This approach not only gives employees a smooth end-to-end experience but also lightens the load on IT.
- » **Manageability Services.** Cost and complexity make it an ongoing challenge to manage end-user devices in a multi-vendor, multi-operating system environment. HP Manageability Services uses innovative technologies such as automation and AI to manage the health and security of devices, reduce cost and complexity, and simplify IT workloads and deliver a better employee experience.

- » **Security Services.** Heterogeneous technology environments often face security gaps, yet ensuring security across users, devices, applications, and operating systems has never been more important. Constrained company IT security resources benefit from the complement of HP's team of experienced, certified experts to identify gaps proactively and recommend risk-reducing methods to address vulnerabilities.

Challenges

HP will face increased competition from single-source, integrated system providers for support, deployment, and workplace services. This competition will be especially strong from service providers trying to create better customer experiences, which requires an integrated approach to solving complex workplace issues to deliver a comprehensive employee experience. HP should continue to build a robust practice that develops and maintains partner relationships, which will help create a diverse and robust portfolio of services capabilities.

HP must have the discipline to maintain a portfolio of service packages that are easy to understand, procure, and consume across all aspects of its product suites. Customers should have the ability to easily select the appropriate service plan for their IT environment, without extensive customizations or alterations to existing support services packages. A standardized services portfolio can be a good way to address this issue.

Conclusion

Providing a frictionless experience with offers such as device as a service with secure technology has become a competitive differentiator for organizations seeking to improve the experiences and productivity of their employees. Creating an effective digital workplace requires investing in back-end technology to provide secure and flexible support via any device, at any time of day, in any location. For many organizations, the investment in automation and artificial intelligence required to create these seamless, consumer-like experiences with IT is a challenge. If HP Services can help address the challenges described in this paper, the company has a significant opportunity to transform the experiences that its customers' employees have with technology in the workplace.

About the Analyst



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Rob Brothers is a Program Vice President for IDC's Datacenter and Support Services program as well as a regular contributor to the Infrastructure Services and Financial Strategies programs. He focuses on worldwide support and deployment services for hardware and software and provides expert insight and intelligence on how enterprises should be addressing key areas for datacenter transformation and edge deployment and management strategies.

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