

A Frost & Sullivan White Paper



Responding to Disruptive Shifts in the Workplace

How Video Makes Remote Work and the Borderless Office Possible

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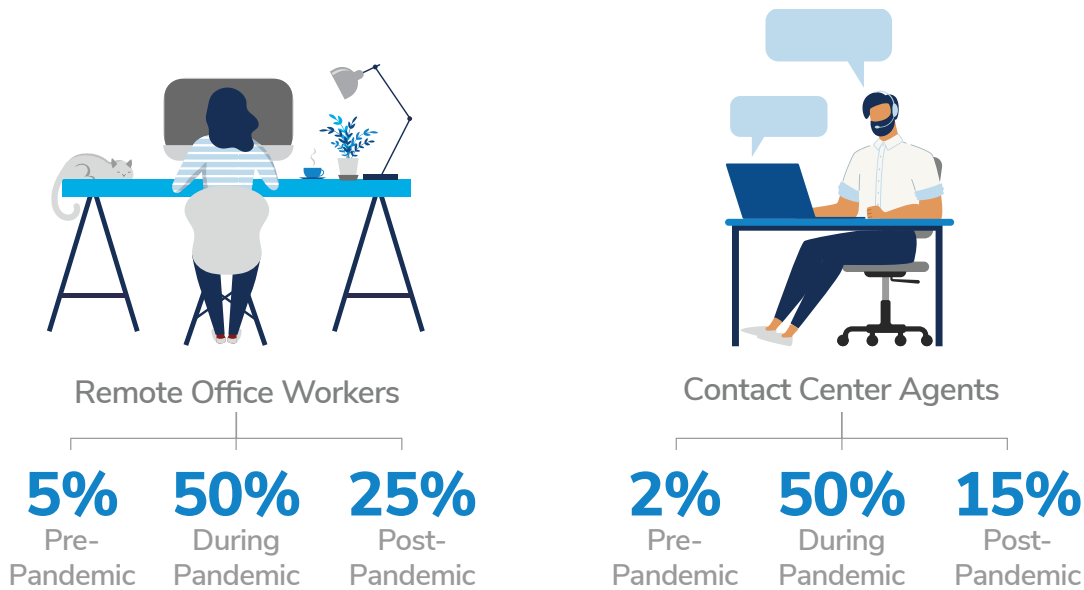
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INTRODUCTION

As organizations visualize the workplace of the future in the post-pandemic era, they are preparing for disruptive shifts. In recent years, increased globalization, automation and digitization have transformed the nature of work, the workplace and the workforce. The emergence of the borderless organization also means employees increasingly choose where they work. Work is not a “job” or a physical location anymore. It has become an ongoing task with no defined time or physical boundaries, seamlessly integrated with our personal lives. COVID-19 will be a key influencer and accelerator of these trends.

Before the global pandemic, business leaders were increasingly embracing rapid digitization to prepare for the future of work. From multinational corporations and small businesses to educational institutions and healthcare facilities, COVID-19 has thrust every organization into the future faster than expected.

REMOTE WORK: THE NEW NORMAL



Source: Frost & Sullivan

COVID-19 will be a disruptive catalyst for the future of work, forever changing the way people live and work.

As organizations worldwide adopt innovative strategies and data-driven insights to help employees resume work in a safe and practical manner, a mix of remote work and staggered return to offices will be the new reality. Business leaders and employees must fully embrace the broad workplace transformation that prepares their organizations for the next normal. The question is, are they ready for it?

THE NEW NORMAL HINGES ON THE INTERSECTION OF PEOPLE AND TECHNOLOGY

Navigating the post-pandemic world will come down to two key elements: people and technology. When employees experience a radical change such as shifting to work from home (WFH) for extended periods—sometimes in restricted and noisy spaces—it's not easy. For many, it can be unproductive and ineffective. Digital collaboration technologies have made this transition smooth while keeping distributed work teams engaged and connected.

Users globally have reported a spike in productivity due to the shift to WFH. Survey data shows that, on average, remote employees work 1.4 more days every month or 16.8 more days every year compared to those who work in an office.¹ In another survey, 85% of the respondents said that productivity has increased in their business as a result of greater flexibility of work hours and work locations.²

The ongoing crisis has proved two things—people can work effectively from homes and investing in next-gen collaboration tools allows them to stay connected, enabling business continuity.

A distributed workforce needs best-in-class communications that take them as close as possible to being with co-workers in a physical office. Team chat, video and content collaboration have become pivotal to anytime, anywhere work.

IT decision-makers and business leaders must take a cohesive approach to adapt to the rapidly unfolding new work order by focusing on five key priorities:

- Look beyond the immediate future - Integrate remote work into standard operating procedures for the long term.
- Build a virtual team culture - Accelerate the adoption of smart work by investing in personal collaboration tools that keep remote workers engaged.
- Support the users - Provide user education and best practices for effective remote work.
- Ensure unprecedented scalability - Invest in hyperscale cloud and implement standardization for technology acquisition across communication devices and cloud services.
- Ensure governance and security - Assess the impact of WFH on the organization's compliance and security posture by enhancing manageability and monitoring of users and workflows.

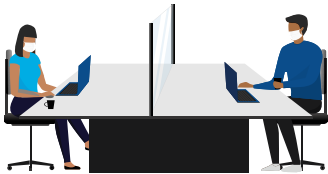
1. <https://www.airtasker.com/blog/the-benefits-of-working-from-home/>

2. Source: IWG Global Workplace Survey

FUTURE OF WORK AND THE CHANGING WORKPLACE

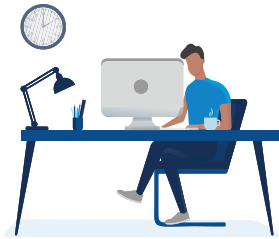
From alternate-desk seating and strictly assigned workspaces to one-way walkways, sanitized offices and healthier air circulation systems, the seismic changes are compelling businesses to rethink standard work practices. The new ecosystem will not necessitate five-day occupancy in the office. Employees will transition effortlessly from their home office to a physical workplace as the emergence of the hybrid office reshapes work across a continuum of locations, tasks and teams.

POWERFUL FORCES THAT WILL RESHAPE THE FUTURE OF WORK



The New Workplace

- Reconfigured open offices with partitions and movable walls
- Adjusted floor plans with desk distancing
- Offices and meeting rooms with reduced occupancy
- Emergence of the contactless meeting room
- Real estate expansion to accommodate new distancing protocols—more meeting rooms
- Video in every space to connect increasingly dispersed teams



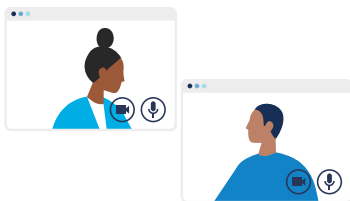
The New Workforce

- Shift from a centralized to distributed organization
- Flat organizations with smaller cross-functional, self-organizing teams
- Hybrid workforce, contractors, gig workers, freelancers
- Smaller projects with agile processes
- Renewed focus on employee well-being and purpose



The Hybrid Office

- Long-term WFH programs
- Staggered back-to-work schedules
- Needs-based office presence
- Need for remote operations and operational resiliency
- Seamless work-life integration



Technology and Data-driven Work

- Travel restrictions and more video meetings
- AI and rich analytics to track workplace and meeting room occupancy, user behavior and technology usage
- User-preferred apps and devices that facilitate hybrid work
- Cloud-based unified and integrated communications
- New supply chains and cost/operations optimization
- Rethinking established workflows—shift to remote visits/video interactions

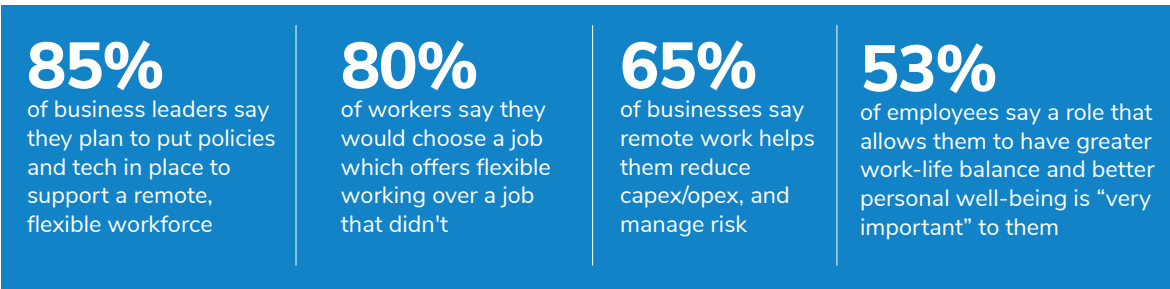
Source: Frost & Sullivan

PREPARING FOR TOMORROW'S WORK

The workflows of tomorrow will look vastly different. For HR, it means communicating new remote work policies, conducting video interviews, virtual onboarding and training, and implementing virtual wellness programs for employee morale and engagement. For sales, it means less in-person client visits and more video interactions and virtual demos. For marketing, it means an accelerated shift to digital marketing and more marketing webinars to build leads and engagement. The list is endless. The bottom line: every facet of business, education and healthcare will be transformed, thrusting us into a new era of digitization.

Travel restrictions and limited in-office presence will be the new normal. And when travel does return, it will look vastly different—it will become more time-consuming and cumbersome as airlines put a myriad of new safety in place. More than ever before, business users will prefer the efficiency of video conferencing over travel.

The rapid shift to remote work will leave an indelible impact on technology adoption and user expectations.



Source: Dell, Gallup, IWG

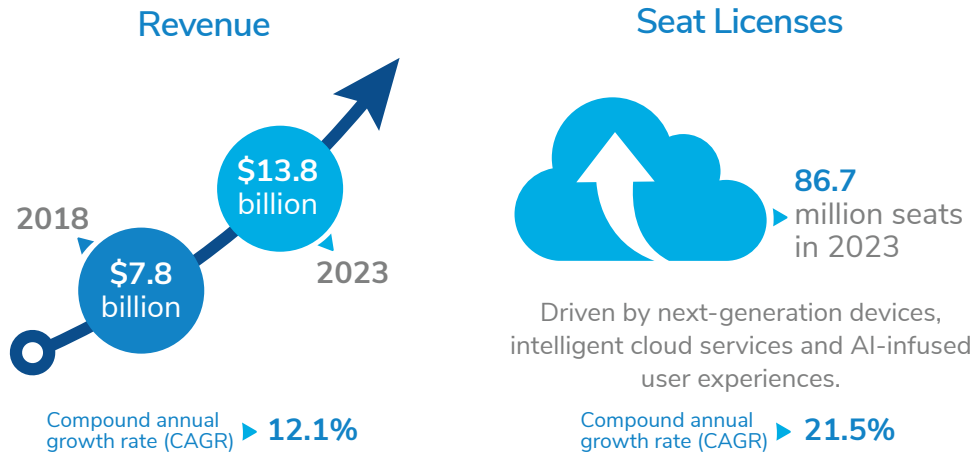
Eliminating commute times to the office, a better work-life balance and the ability to work at the most optimal times that allow for greater focus are among the many benefits of remote work. In addition, there are immediate cost-savings on office space and operations. It also helps businesses expand the talent pool across gig workers, freelancers, contractors and employees situated across geographies.

Balancing both remote workers and in-office workers will be a reality for more and more businesses. As a result, businesses must find newer and more engaging ways to communicate. The time is now to build a long-term strategy to invest in leading-edge communications and collaboration solutions that enable rich interactions across dispersed locations and teams.

INVESTING IN VIDEO COLLABORATION EMPOWERS REMOTE WORKERS

Working from home doesn't mean that employees should sacrifice the power of human communications and forgo rich face-to-face interactions. For many leading organizations today, video meetings have become the go-to communications tool. Video conferencing adoption has seen rapid-fire growth.

VIDEO ADOPTION IS BOOMING



Source: Frost & Sullivan

In a recent Frost & Sullivan global survey of C-level decision-makers, heavy users of video conferencing report that they have seen six-times faster product innovation, five-times improved customer experience, and six-times accelerated decision-making over light users.

VIDEO CONFERENCING BENEFITS: CIO PERSPECTIVE



Source: Frost & Sullivan

Maintaining collaborative connections with coworkers, business partners and customers is the very fabric of business innovation and success. Modern video meetings are a game-changer, allowing remote workers and distributed teams to talk face to face, share files and screens, and whiteboard ideas. However, in the past, technologies accessible to remote workers have not kept pace with the advancements that have taken place in modern offices. Remote work has traditionally been viewed as a compromised environment where “good enough” communications are acceptable.

Remote workers expect the same effective, hassle-free video meeting experience that they have become accustomed to in modern meeting rooms—high-quality, frictionless meetings that are simple to deploy, easy to use, and a click away.

Employees working from home want to remain connected through better collaboration experiences. Businesses that do not adopt the new way of working will fail to build relationships with the new supply chain, miss out on creativity and productivity that thrives on better communications between employees, and will be less agile and innovative.

THE IT IMPERATIVE—FIVE CRITICAL SUCCESS FACTORS TO EFFECTIVE COLLABORATION

COVID-19 compelled organizations globally to switch to remote working in a short period of time. Although the migration went reasonably well for many organizations, IT and business leaders discovered several unseen pitfalls. A cohesive remote work implementation policy has far-reaching implications on accessibility, security, and manageability. It is not enough to simply provide the necessary communications tools. A successful migration also requires clear, long-term technology implementation guidelines and ongoing support.

Though it is too early to know to what extent organizations will go back to the old way of working, business leaders should think ahead and be prepared. In addition to ensuring the health and safety of workers, IT and business leaders must focus on the following key tenets that enable frictionless work:

1

Enable organization-wide access to rich collaboration:

- **Productive personal collaboration** – Help employees set up their desks with all tech essentials designed to enable more productive work while minimizing fatigue. These include ergonomic mice and keyboards for comfort, external webcams for high-quality video meetings, and noise-canceling headsets for noisy home environments and offices.
- **Smart meeting room experiences** – Meeting rooms must foster easy, ad-hoc and agile collaboration. Invest now in the modern meeting room technologies that pivot on high-quality conference cams with auto framing, intelligent audio with background noise suppression, digital controllers for one-touch-to-join and instant content sharing, and smart under the table cabling to keep rooms clutter free. Choose solutions that offer easy installation, without requiring expensive proprietary equipment and complex configurations.
- **Any-to-Any Communications** – Rich internal and external collaboration is a must in the borderless work of today. IT must future-proof investments by ensuring that the meeting room conference cams and audio devices are tightly integrated and configured for intelligent cloud services like those from Google, Microsoft, or Zoom while offering a holistic security framework that has become a table stake.

2

Ensure support and consistent user experience – IT must provide comprehensive guidelines and the required hand-holding to users on technology acquisition. Remote workers must acquire the best audio-video devices and cloud services that allow for comprehensive IT support and a consistent user experience across all meeting environments and spaces as employees balance dual work environments of their homes and offices.

3

Implement unprecedented scale – As organizations adjust to new distancing policies and implement meeting room occupancy limits, IT leaders must work cross-functionally with the facilities managers to ensure they invest in more meeting spaces. More meeting rooms and more video meetings also mean IT must carefully select solutions that can scale up and down as business needs evolve and offer value without compromising on quality.

4

Tap into unified management and analytics – As the number of meeting rooms grows and remote work expands flexibly, it is critical that IT has access to a single pane of glass for remote management and monitoring, including remote upgrades, and for resolving potential issues across homes, office desktops, meeting rooms and BYO devices. In addition, data-driven deep insights will help IT manage facets like room utilization and physical distancing while offering visibility into meeting room issues in real time so it can resolve problems before they affect a meeting.

5

Harness the power of AI – AI-led enhancements are changing the way we work. Features like smart auto-framing, virtual backgrounds, adaptive audio, and automated transcripts allow remote workers in the most challenging surroundings to not only look professional and feel confident but also have more productive meetings.

NEXT STEPS—NO WORKER LEFT BEHIND

Change often presents new opportunities and spurs innovation in unexpected ways. There is significant disruption coming our way. Remote working is here to stay and will, more than ever, become an integral part of the way we work. Organizations must prepare now to give users more choice of work environments and collaboration tools with a focus on people and performance. Video collaboration is the glue that holds an increasingly fragmented workforce together. Not only does it better connect employees, customers, and partners and keeps everyone on the same page, it also builds a more agile, efficient and sustainable business.

There has never been a greater need to video-enable the entire workplace. A no-compromise, rich video collaboration experience ensures that no worker is left behind, whether they are at home or in the office. Identify, partner and evolve with forward-thinking technology providers that offer:

- **Ease of use** with exceptional user experience.
- **Cost-effectiveness** for digital transformation across the organization.
- **Flexibility and scale** to evolve with your business needs.
- **Investment protection** by working with any cloud platform.
- **Consistent user experience** across all meeting environments and spaces.

Best-in-class video and content collaboration have become the cornerstone of digital transformation— accelerating innovation, decision-making and time to market. For business leaders and IT decision-makers, the opportunity is now to reinvent their business and create a competitive advantage by unleashing the power of video for every worker and in every space, regardless of where work takes place.

NEXT STEPS

- ① **Schedule a meeting with our global team** to experience our thought leadership and to integrate your ideas, opportunities and challenges into the discussion.
- ② Interested in learning more about the topics covered in this white paper? Call us at 877.GoFrost and reference the paper you're interested in. We'll have an analyst get in touch with you.
- ③ Visit our **Digital Transformation** web page.
- ④ Attend one of our **Growth Innovation & Leadership (GIL)** events to unearth hidden growth opportunities.

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