THE DIGITAL WORKPLACE
In the Connected Organization 2014
by JANE McCONNELL
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Important

The utmost care has been taken in compiling and analyzing the information contained in this document. The interpretation, views and opinions expressed on the basis of the results are those of the author. They do not necessarily represent those of the individual organizations who participated in the survey.

Jane McConnell, jane@netjmc.com

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About the author

**Strategic Advisor**
Jane McConnell has 16 years of extensive, hands-on consulting experience with intranet and digital workplace strategies in large, global organizations. She has conducted over 120 intranet/digital workplace projects for 60 organizations.

**Researcher**
Jane has broad industry knowledge from nine years of detailed research with hundreds of organizations around the world. She created and has conducted the annual Trends Surveys since 2006.

**Management Briefer**
Jane gives senior managers a concise, strategic view of the digital workplace, trends and practices. These briefings, supported by data and examples, enable management teams to grasp the issues, understand the role of leadership and envisage their own roles and calls to action.

**Speaker and Workshop Leader**
Jane inspires and motivates audiences seeking insights into issues and strategies associated with the digital workplace. Her discourse is rooted in data, and years of high-level experience as a strategy advisor. Her keynotes and conference workshops are always highly rated.

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The digital workplace concept is gaining ground in many organizations. It is crucial to understand that the digital workplace is much more than technology. It is part of a new way of working that is more open, collaborative, engaging and ultimately productive for people and organizations. The digital workplace lives at the intersection of people, organization and tools.

This 8th annual report is called “The Digital Workplace in the Connected Organization” and is a milestone in two specific ways. First, it represents a major step forward in understanding how the digital workplace impacts and is impacted by organizational processes, structures, leadership, culture and mindset. The survey covered these points in addition to the traditional questions about people capabilities, mobile services, finding expertise, sharing knowledge and so on. This let me draw a more complete portrait of Early Adopters than in previous years, and get a sense of what really makes them different.

Secondly, a Scorecard has been defined, based on the nine dimensions of the digital workplace model described in this report. The Scorecard works from self-assessment: scores are calculated based on several hundred data points from the responses to the online survey questions.

“The Digital Workplace in the Connected Organization” contains twenty-three “In Practice” cases that are developed in more detail than in previous years. The organizations selected for these cases stood out during the data analysis process, either because of high scores or because their comments and examples are relevant to challenges many organizations are facing today.

The digital workplace is part of the journey many organizations are on today as they transform their ways of working. The role of the digital workplace is to facilitate this transformation. The digital workplace should also be one step ahead, helping make the vision actionable, meaningful and rewarding.

Jane McConnell
This report would not have been possible without the help and support of many people. I would like to express appreciation to the following people and organizations and I apologize in advance for those I may have forgotten.

I’ll start with the members of the 2013-2014 Digital Workplace Advisory Board who provided strategic and pragmatic advice all along the process: Bjoern Negelmann, Brian Holness, Céline Schillinger, Cornelis van der Brugge, Ernst Décsy, Franklin Bradley, Gloria Burke, Jon Husband, Linda Tinnert, Martin Risgaard, Rawn Shah, Sam Marshall, Stéphane Akinin, Susan Scrupski and Thomas Maeder. A special thanks to Ernst Décsy for his extensive re-reading support.

You can find their details in the Appendices.

I appreciate the time invested by the 314 organizations that collectively spent from 600 to 700 hours providing input to the survey. A special thanks goes to the organizations that provided In Practice case studies: Aegon, Air Liquide Group, Alcatel-Lucent, Arup, BASF SE, BT plc, Chubb Group of Insurance Companies, COWI, Danish Refugee Council (DRC), Jyske Bank A/S, Lexmark International Inc., Mercy Corps, Minter Ellison, NRMA Motoring & Services, OFS Brands, Orange, PCL Constructors Inc., PwC US, Tata Steel Europe, Unisys and Utrecht University.

A very strong thank you goes to Change Agents Worldwide, a global network of professionals specializing in future work technologies and practices led by Susan Scrupski, CEO and Founder. I am a charter member of the group, and repeatedly find ideas and inspiration from other members, all of whom are on the leading edge of organizational change. (www.changeagentsworldwide.com)

I want to extend my appreciation to the members of IntraNetwork, a work group of digital practitioners from some of the largest organizations in the world. Our monthly work sessions in Paris are opportunities for me to get firsthand, frank and invaluable feedback to my work. (www.intranetwork.fr)

Special thanks to Martin Fenge, who provided superb design services. (www.fenge.com)

I also wish to thank my many clients who, over the past 16 years, have constantly forced me to face the reality of life in the trenches. I have learned more from them than they have from me!

The last person I have to thank, more than anyone else, is my husband, without whom the nine editions of this report would never have happened.
How to read and use this report
Designed as an analysis and awareness tool to be used in meetings and workshops.

Read in 5 minutes
The 2-page Executive Summary and the Four Business Scenarios.

Read in 30 minutes
Start with the Executive Summary, followed by Nine Key Insights and the Four Business Scenarios. Then dive in deeper and read the Key Points for each chapter.

Use as a reference tool
After the 30-minute read, you’ll know which topics are important for you. Use the detailed table of contents to locate them, then study the charts and commentary.

Use as a comparative snapshot
Look at the Scorecards for your industry and the top digital workplaces within your industry. Check out the Scorecard for Early Adopters. If you participated in the survey, you can then compare your Scorecard to these examples and identify potential action areas. If you did not participate in the survey, contact Jane McConnell for information about doing your own self-assessment by taking the same survey as the 314 organizations.

Use as a communication tool
This report is designed to be used during meetings and conversations in your organization. Each page is self-contained, much like a presentation slide. Identify the pages that address the topic of your conversation, display them in full screen mode and you will be sure to trigger a lot of discussion.
Introduction

Executive Summary
Digital Workplace and Scorecard
Nine Key Insights
Four Business Scenarios
Executive Summary
The digital workplace is much more than technology: it lives at the intersection of people, organization and tools.

“The Digital Workplace in the Connected Organization” is the 8th annual report based on research conducted yearly on a global scale. It contains analysis, detailed charts and numerous “In Practice” case studies.

The digital workplace is much more than technology. It is a blend of Capabilities, Enablers and above all, Mindset - all essential perspectives in how organizations work. New virtual structures such as communities, new processes such as crowdsourcing, open and participatory leadership, and mobile services for the workforce are only some of the key criteria for an effective digital workplace.

The digital workplace is becoming an essential part of doing business, and should therefore be treated as a strategic asset.

For the first time ever, a Digital Workplace Scorecard has been defined. This was done in collaboration with the 2013 Digital Workplace Advisory Board made up of advanced practitioners and thought-leaders around the world. Based on self-assessment, the Scorecard helps organizations understand where they are today, and provides a framework for defining a vision and identifying priorities to transform that vision to reality.

314 organizations responded to over 100 questions online. Several hundred data points were then mapped to the nine dimensions of the Scorecard and transposed to a maturity scale. Early Adopters were identified (top 20 percent) as well as the Majority (80 percent). The Scorecard was run for specific industries, and patterns have been identified in the very “top of the top” within industries. (See details in the next chapter.)
Highlights from the research

- The top two strategic drivers overall for the digital workplace are “increasing organizational intelligence” and “gaining efficiency and cost-savings”. The first is number one for Early Adopters; the second is number one for the Majority.
- Early Adopters report a much higher rate of top management as a “driving and active” force in their digital workplace initiatives.
- Operational management and business support functions are “actively involved in strategic decision-making” and “actively using the digital workplace” in Early Adopters.
- Case studies and data show that the digital workplace helps organizations enable their customer-facing workforce, helping them interact with customers in real-time with up-to-date information.
- An effective digital workplace facilitates fast reaction and proactive initiatives when an organization is faced with unexpected events such as environmental emergencies, challenges from competitors or global market shifts.
- Mobile services for the workforce will be deployed in 30 to 40 percent of organizations by the end of 2014.
- Internal crowdsourcing is now deployed enterprise-wide in over half the Early Adopters who report “transformational” or “significant” impact on their organization.

- Enterprise Q&A is bringing purpose to social networking, letting people who do not know each other share information and solve problems across the organization.
- Real-time communication combining voice and video is creating “virtual water cooler” moments, bringing people closer and building relationships across silos.
- Cross-organizational communities are playing a long-term strategic role as custodians of knowledge, thus complementing traditional hierarchical structures.
- Early Adopters have organizational cultures that are more open and based on teamwork. Top managers, as well as Communication, IT and HR managers, are more “open and participatory” in their leadership styles and ways of working.
- Few organizations report “very confident” when asked if they are able retain knowledge and know-how when baby-boomers retire. The few that do say the digital workplace plays a “definite role” in this capability.
- Physical workplaces are slowly evolving toward more “non-territorial” workspaces, encouraging the flow of ideas and information among people.
Customer Focus
Serving the workforce who serve the customers

Key Findings
Charts and Analysis
In Practice

Networks and Social Learning - Arup
Knowledge Management Key to Corporate Strategy - Orange
Social and Real-Time Business - Minter Ellison
Customer Service - NRMA Motoring & Services
Key Findings: Customer Focus

The ultimate purpose of the digital workplace is to help serve customers

The ultimate goal of a digital workplace is to help people and organizations fulfill their purposes. The purpose of an organization is to serve their customers or users or citizens, depending on what type of organization they are.

Historically, intranets were designed to be communication tools. When collaborative spaces emerged, it was almost always on a different platform, and often implemented “privately” between IT and business managers. Sales and marketing people have had their own dedicated applications for years and rarely used the intranet. Then, social experiments started popping up throughout organizations.

Pseudo digital workplace becoming true digital workplaces

This enthusiastic, uncoordinated energy resulted in a “pseudo digital workplace” made up of an disparate collection of platforms, services and content, all with different owners who were usually unaware of what others were doing.

Now that the “true digital workplace” concept is gaining ground, we are moving toward a holistic vision of capabilities, practices and platforms. Business is back in the game with the rest of the organization and is in fact beginning to play a significant role.

Business is playing a significant role in the digital workplace.

Transformation, stimulated by external forces, is impacting business functions inside the organization

The customer-facing workforce is in regular contact with people working in new ways - more social, more collaborative. This shows when looking at Early Adopters where business managers are much more active in internal social collaboration than those in the Majority. (See chapter New Organizational Design.)

Business appropriating the digital workplace with Operations leading

Early Adopters lead here, in particular with Operations, R&D/Engineering and Sales/Marketing/Customer-Facing business functions.

• Forty-six percent of Early Adopters report that operational managers have “active use” of the digital workplace for their jobs.
• 45 percent of Early Adopters report that “business and core activity processes” are deployed enterprise-wide and another 48 percent report “in some parts” totaling 93 percent.
• Corresponding figures for the Majority are 10 and 64 percent.
.... Key Findings: Customer Focus

Customer, service delivery tools part of the digital workplace

• “Customer or service delivery tools” are part of the digital workplace for 57 percent of Early Adopters compared to 19 percent of the Majority.

• Early Adopters use video in operational and business contexts three times more than the Majority.

• 70 percent of Early Adopters use “web-based video meetings, conference calls and webinars” with customers compared to 52 percent of the Majority.

People taking control when the enterprise is lacking
Both Early Adopters and the Majority use “unofficial, ad hoc collaborative workspaces” in the public cloud. This is part of a greater trend observed today and confirmed in this study that people are increasingly taking their tools into their own hands and using what suits them best regardless of corporate policies.

Traditional email and business-purpose videos are used by many Early Adopters

Email still a primary communication tool with customers and partners
In spite of the digital lead held by Early Adopters, 55 percent state that “people rely primarily on email” to communicate with external partners.

Video for business purposes
Video is being used for business purposes quite well over half the Early Adopters.

Early Adopters take greater ownership of collaborative workspaces shared with customers and partners.

• 76 percent of Early Adopters set up their own spaces and invite the external party to join. Only 15 percent use their partner’s space. The situation is reversed for the Majority where 40 percent use their partner spaces and 47 percent set up their own collaborative spaces.
Key Findings: Customer Focus

Early Adopters report that customer-facing employees are online, informed and able to better serve customers.

The customer-facing workforce is finding it easier to get what they need when they need it.

Respondents were asked “How easy is it for customer-facing people to find the information they need, provide rapid service, collaborate with their customers and colleagues and in general have a smooth and efficient work experience?”

It was specified that the word “customer” is used in a generic sense meaning the “targets” or users of the core activities of the organization. This translates to patients in the case of healthcare industry, to citizens for government agencies and of course customers for commercial organizations.

- 57 percent of Early Adopters say it is “relatively easy” (24 percent for the Majority) but only 13 percent reported it was “very easy” among the Early Adopters. None of the Majority chose this response.
- Both segments consider that the digital workplace plays a large role in this, with 43 percent of Early Adopters and 24 percent of the Majority responding “yes, definitely.”
Business Functions Use the Digital Workplace
Higher usage by business functions distinguishes Early Adopters from the Majority.

When Operations, R&D and Sales and Marketing have “active and extensive” use of the digital workplace, it is clearly part of the way an organization works.

Figure 10 - Degree of usage of the digital workplace by different business-related functions. Majority compared to Early Adopters.

OBSERVATIONS

The differences in “active and extensive use” are significant between the Majority and Early Adopters.

Combining “active and extensive use” and “active and regular use”, the percentages of Early Adopters are over twice as high as for the Majority.

In the Majority, the digital workplace has not yet truly reached the business functions with the exception of Sales/Marketing/Customer-Facing workforce where “active and regular use” and “moderate use” together reach 51 percent.

This is far lower than Early Adopters but indicative that business is involved to a significant extent.
Customer and Service Delivery Support
Customer-related processes are more widely deployed in Early Adopters.

The Majority do not use the digital workplace to provide customer-facing employees with their work tools.

Figure 11 - Business-related processes included in the digital workplace. Majority compared to Early Adopters.

HOW TO READ THE CHART

Items included in the survey
- Business/core activity process support, dashboard
- Customer or service delivery tools (e.g. call center management, customer relationship management)
- Places/systems for sharing and managing documents
Customer-Facing: Ease of Getting Information
How easy is it for your customer-facing workforce to access everything they need when in front of a customer?

Scorecard for 97 organizations reporting “relatively easy”.

Scorecard for the 9 organizations reporting “very easy”.

Figure 16 - Customer-facing “relatively easy”. n=97

Figure 17 - Customer-facing “very easy”. n=9

CAPABILITIES
Where people and tools come together, serving the purposes of individuals, business and the enterprise.

Individual: The people perspective. Liberating the individual voice and empowering people.

Business: The core activity perspective. Serving customer-facing workforce and customer needs from the inside out.

Enterprise: The cross-organizational perspective. Breaking down silos and working as a connected organization.

ENABLERS
Where the organization and tools come together, facilitating change.

Process: Collaborative ways of working bringing new processes and altering traditional processes.

Structure: New virtual structures, such as communities, teams and networks that complement hierarchical structures.

Reach: Extending access to all the workforce: anywhere, anytime, any device.

MINDSET
Values, expectations and ways of thinking that determine how people and organizations act.

Leadership: Influence that brings change.

Culture: Attitude, behavior, style and systems that are implicit in the organization.

Strategic asset: Treating the digital workplace as a strategic asset, essential for doing business.

Legend: + indicates early adopters across all industries
Humanizing the Enterprise
Making the individual the starting point

Key Findings
Charts and Analysis
In Practice

Learning Through Communities - BT plc
Reaching Floor-Field, Sharing Knowledge - PCL Constructors Inc.
Useful and Fast Replies Add to Personal Drive and Motivation - Jyske Bank A/S
Project Sites - the Virtual Water Cooler in a Global Company - COWI
BYOD Making Its Way in the Enterprise
Policies in place and support provided in over half the Early Adopters.

**BYOD for half the Early Adopters**

<table>
<thead>
<tr>
<th>Majority %</th>
<th>Early adopters %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, and policy in place</td>
<td>50</td>
</tr>
<tr>
<td>Defining our policy</td>
<td>23</td>
</tr>
<tr>
<td>Unofficially accepted</td>
<td>12</td>
</tr>
<tr>
<td>Not allowed</td>
<td>9</td>
</tr>
</tbody>
</table>

**Similar policies for all**

<table>
<thead>
<tr>
<th>Majority %</th>
<th>Early adopters %</th>
</tr>
</thead>
<tbody>
<tr>
<td>A stipend (fixed sum of money)</td>
<td>74</td>
</tr>
<tr>
<td>List of approved brands</td>
<td>47</td>
</tr>
<tr>
<td>Reserve right to erase</td>
<td>78</td>
</tr>
</tbody>
</table>

**More support in Early Adopters**

<table>
<thead>
<tr>
<th>Majority %</th>
<th>Early adopters %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide support officially</td>
<td>23</td>
</tr>
<tr>
<td>Provide best effort support</td>
<td>53</td>
</tr>
<tr>
<td>Do not support</td>
<td>13</td>
</tr>
</tbody>
</table>

Figure 39 - BYOD accepted or not in the enterprise. Majority compared to Early Adopters.

Figure 40 - Mobile policies in the Majority and Early Adopters.

Figure 41 - Technical support in the Majority and Early Adopters.

**HOW TO READ THE CHARTS**

**BYOD accepted or not**
- BYOD policy in place and allow people to use their own devices for work purposes.
- In the process of defining our BYOD policy.
- We tolerate BYOD unofficially.
- Do not allow personal devices to access organizational resources.

**BYOD policies**
- A stipend (fixed sum of money) is given to employees who purchase their own mobile device (smartphone, tablet).
- We provide a list of approved brands and operating systems from which employees can make their choice.
- We reserve the right to erase all content if a device is lost or stolen.

**BYOD technical support**
- We provide support officially.
- We provide "best effort" support, not official support.
- We are planning to provide support.
- We do not support devices that are not provided by the enterprise.
Scorecards
Industries and top digital workplaces.

Ambitious organizations will want to compare themselves not with industry averages, but with the top digital workplaces within their industry. Therefore, two scorecards are published for each industry: the industry average and the very top ones in the industry.
Scorecards for Energy and Resources
Including Utilities, Mining and Metals

Energy and resources: industry averages

<table>
<thead>
<tr>
<th>Level</th>
<th>Capabilities</th>
<th>Enablers</th>
<th>Mindset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 5 Embedded</td>
<td>+</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Level 4 Operational</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 3 Organized</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Level 2 Beginning</td>
<td>Structure</td>
<td>Reach</td>
<td>Asset</td>
</tr>
<tr>
<td>Level 1 Ad hoc</td>
<td>Individual</td>
<td>Enterprise</td>
<td>Process</td>
</tr>
</tbody>
</table>

Figure 111 - Self-assessment: Energy, resources. n=27

Energy and resources: top digital workplaces

<table>
<thead>
<tr>
<th>Level</th>
<th>Capabilities</th>
<th>Enablers</th>
<th>Mindset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 5 Embedded</td>
<td>+</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Level 4 Operational</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 3 Organized</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Level 2 Beginning</td>
<td>Business</td>
<td>Enterprise</td>
<td>Structure</td>
</tr>
<tr>
<td>Level 1 Ad hoc</td>
<td>Individual</td>
<td></td>
<td>Reach</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Leadership</td>
</tr>
</tbody>
</table>

Figure 112 - Energy, resources. Top 2.

CAPABILITIES
Where people and tools come together, serving the purposes of individuals, business and the enterprise.

- **Individual:** The people perspective. Liberating the individual voice and empowering people.
- **Business:** The core activity perspective. Serving customer-facing workforce and customer needs from the inside out.
- **Enterprise:** The cross-organizational perspective. Breaking down silos and working as a connected organization.

ENABLERS
Where the organization and tools come together, facilitating change.

- **Process:** Collaborative ways of working bringing new processes and altering traditional processes.
- **Structure:** New virtual structures, such as communities, teams and networks that complement hierarchical structures.
- **Reach:** Extending access to all the workforce: anywhere, anytime, any device.

MINDSET
Values, expectations and ways of thinking that determine how people and organizations act.

- **Leadership:** Influence that brings change.
- **Culture:** Attitude, behavior, style and systems that are implicit in the organization.
- **Strategic asset:** Treating the digital workplace as a strategic asset, essential for doing business.

Legend: + indicates early adopters across all industries.
Survey Demographics

Participating organizations range in size from under 1,000 to over 100,000 employees.

Geographical split based on the location of headquarters office:

- Europe - 57%
- North America - 26%
- Asia Pacific - 17%

Figure 131 - Participating organizations: size of workforce

n = 314

Figure 132 - Departments or functions of the respondents. %
Globally recognized thought leader and strategic advisor on digital workplace strategy, author Jane McConnell has worked with some of the world’s largest organizations.

In this report, the 8th annual edition, you will find analysis, trends, data and discussion of how the digital workplace is evolving.

The digital workplace lives at the intersection of people, organization and tools and these three perspectives form the foundation for the new digital workplace scorecard, presented for the first time in this report.