

With dispersed workforce and connectivity issues, organizations have accelerated initiatives to move employee-facing applications to the cloud and are investing in improved employee experience and productivity, which translates to better customer experiences, increased profitability, and improved business outcomes.

Moving Toward a Hybrid-First Organization with Seamless Connectivity and Collaboration

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Introduction

The shifting business, health, and economic conditions of the past few years have forced organizations across all industries to reimagine the ways in which work gets done. With recessionary rumblings, many pundits have questioned whether the changing economic conditions in 2023 will affect technology investments. As hybrid work drives a greater need for collaboration and employee experience (EX), organizations continue to invest in connectivity and cloud deployments to implement hybrid work at scale, ensuring employees stay connected, engaged, and productive. Organizations have long focused on using technology to improve customer experience (CX) to drive bottom-line revenue. However, they rarely made the same differentiating investments in supporting employees; now, they have firmly turned their focus to improving employee experience.

Moving Toward Resilient Hybrid Work

As hybrid and "work from anywhere" models evolve, companies have transitioned through various stages of hybrid work deployment from a pre-pandemic level of "hybrid by necessity" to hybrid models that did not work ("hybrid redux") to the current era of "hybrid by design." To implement hybrid models, organizations need to think about the ways in which technology impacts culture and organizational governance. They need to understand the system dynamics between shifting to cloud-based tools, for example, and the impact on company culture.

The goals should be to have the right mix of digital technologies and platforms and to ensure an organizational culture that allows people to connect, collaborate, and deliver business value.

AT A GLANCE

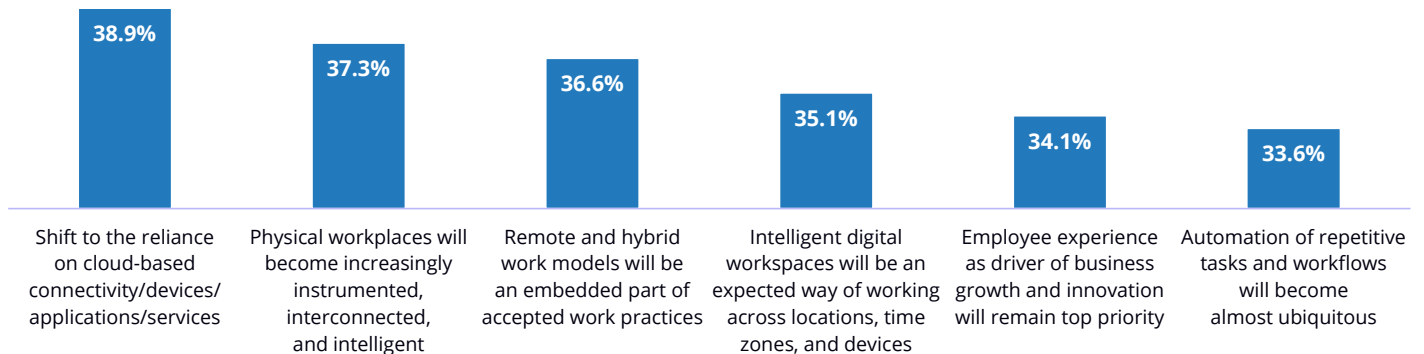
KEY STATS

A recent IDC survey (see Figure 1) asked IT and business executives which work practices and technology investments are most likely to endure:

- » 39% of leaders responded that a shift to the reliance on cloud-based connectivity and devices/applications/ services will remain most important.
- » 37% responded that remote and hybrid work models will remain an embedded part of accepted work practices.
- » 34% highlighted that employee experience as a driver of business growth will remain a top priority.

KEY TAKEAWAYS

- » While there is no universal work strategy in place, hybrid will be the default structure, with varying amounts of work completed remotely, onsite, or in transit depending on the needs of the business.
- » IT has a key role to play in supporting technology parity for hybrid employees, ensuring hybrid employees have the same secure access to resources as onsite or remote employees.

FIGURE 1: *Work Practices and Technology Advances That Will Endure (% of Respondents)*

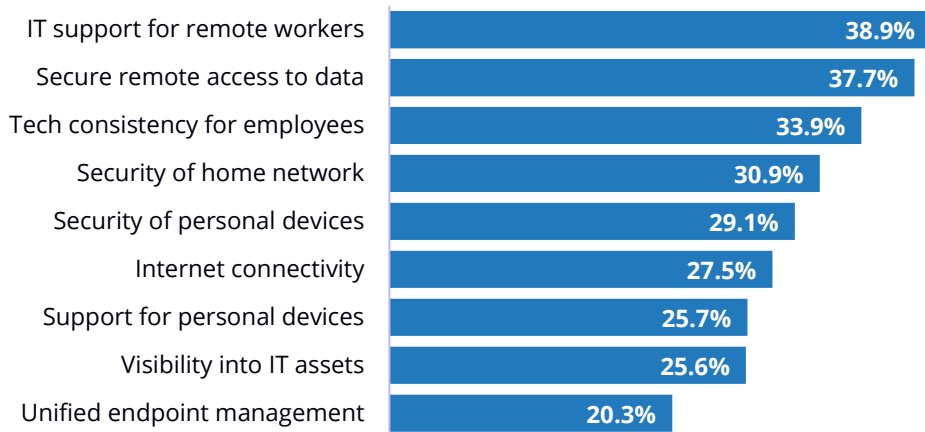
n = 840

Source: IDC's Future Enterprise Resiliency and Spending Survey, Wave 11, December 2022

It's interesting to note that as organizations have shifted to implementing hybrid work models, IDC surveys reflect a shift to a reliance on cloud-based connectivity/devices/applications and devices. Why? It's not that organizations are moving away from hybrid work models so much as they are focusing more intensely on the means to deploy them successfully. No doubt these shifts are in service of greater governance and improved analytics around workforce practices designed to improve productivity. But they are also in the service of attracting and retaining top talent through the creation of improved employee experiences. It is important that organizations migrating to cloud based do so seamlessly and in a manner that does not cause the issues during rollout that a migration was attempting to prevent in the first place.

Hybrid Work Challenges

Global organizations have most of the technologies needed to support hybrid work, and yet they still struggle with challenges around IT support, connectivity, teaming, secure work practices, and tech consistency for all employees (see Figure 2). With the adoption of hybrid workplaces, employees have become as varied and distributed as customers. A hybrid workforce demands a strong user experience to stay productive and effective, despite the change in circumstances. Therefore, additional efforts from IT teams are required to ensure digital services still allow the remote workforce to collaborate in real time.

FIGURE 2: **IT Challenges in a Remote/Hybrid Workplace (% of Respondents)**

n = 1,316

Source: IDC's Global Future of Work Survey, April 2022

In IDC's 2022 *Global Future of Work Survey*, 98% of organizations anticipated challenges in implementing hybrid work. There are major concerns around the technology that allows remote and in-office workers to effectively collaborate, access and share critical information, and stay connected with customers and partners. Shared technology and tools not only must level the playing field in terms of connectivity but also should be reliable, available, and trusted. IDC predicts that by 2025, organizations that have created dedicated hybrid security policies and developed a culture of trust will be 3x less likely to suffer a security breach (source: *IDC FutureScape: Worldwide Future of Work 2023 Predictions*).

How Can IT Create a Trusted Information-Sharing and Connected Ecosystem?

So, how do organizations address the challenges of hybrid work? While much of the conversation around hybrid work has focused on flexibility, security, and teaming, all of these components are underpinned by a crucial resource: technical connectivity. Connectivity (and reachability) is the lifeblood of any organization — if workers can't connect, they can't work. Addressing the internet connectivity issue has become a major priority, as employees, businesses, and consumers increasingly look for digital resilience, where digital experiences are supported by ubiquitous, reliable, and robust connectivity.

IDC defines the "future of connectedness" as enabling the timely movement of data across people, things, applications, and processes to create seamless digital experiences. IDC predicts that by 2027, over 50% of IT budgets in most Global 500 enterprises will be allotted to connectivity, security, compute, and data assets used to deliver their own as-a-service processes and smart products (source: *IDC FutureScape: Worldwide Future of Work 2023 Predictions*).

As organizations become more digitally resilient, they will experience more seamless connectivity across networks, IT systems, and the cloud. Improved connectivity and internet resilience facilitate easier interactions (both digital and physical) between employees, customers, and partners. Connectivity investments typically focus on shifting critical resources to the cloud (24%), making organizations more agile and employees more productive (22%), keeping critical data moving by optimizing network performance (16%), and focusing on interconnectivity (16%) (source: *IDC's Future of Connectedness Survey*, August 2022; *n* = 770).

Organizations are investing heavily in connectivity and digital observability tools to monitor systems and applications, enabling businesses to have constant insight and receive continuous feedback from their systems. These investments help in detecting remote connectivity and network performance issues before they impact the workforce. This detection capability also highlights the usability of back-end observability tools and technologies, which are designed to provide alerts in case of events or anomalies, provide optimum employee experience, monitor network performance, and keep key employee applications running no matter where employees are located.

Benefits of investing in an organization's connectivity strategy are improved network performance, enhanced workforce experience, and superior customer experience.

Hybrid Work Trends

Employee Productivity as a Top Driver of Hybrid Work Transformation

One of the most important business drivers of hybrid work transformation is increased employee productivity. Hybrid work models focus on strong employee experience to drive higher levels of engagement and productivity. With the adoption of these hybrid work models, employees have been enabled to work in varied and distributed ways. The top drivers for work transformation include increased employee productivity (43%), cost savings (38%), and improved customer experience (33%).

Productivity measures are evolving to focus on experience levels for employees as agile practices become more broadly adopted. Organizations have learned a great deal about how interconnected employee experience and customer experience have become. When IDC asked global organizations what metrics they use to measure employee productivity, 48% indicated customer satisfaction, 43% highlighted task-based metrics (e.g., task completion), 37% pointed to improved skill levels, and 36% indicated teaming behaviors (source: IDC's *Global Future of Work Survey*, April 2022; n = 1,316).

Accelerating Business Intelligence

Hybrid models will endure, and they will be supported by automated, integrated technologies and services that are aimed at allowing workers to do their jobs and businesses to be more productive. To get to automation, businesses need actionable insights and the mechanisms in place to act automatically on these insights. Since hybrid is an evolving workforce concept, gathering real-time insights through an organization's analysis of network telemetry is essential, as is achieving transparency when it comes to connection technologies and information pipelines that can be shared in order to act on vital business intelligence.

Benefits of Investing in a Strong Workforce Experience

Remote and hybrid work models offer employees the flexibility they need in terms of space, time, and location. Employees are drawn to organizations that not only prioritize work-life balance but also invest in improved connectivity, robust IT tools, and automation of daily tasks. Top initiatives to improve employee experience include technology upgrades (43%), responsive IT support (37%), and analytics and AI focused on improving employee experience (32%) (source: IDC's *Global Future of Work Survey*, April 2022; n = 1,316). Employees have the flexibility to manage their work to meet desired outcomes, adjusting where and how they work holistically. Technical support for work anywhere capability includes:

- » Frictionless access to applications and data across business systems as well as to collaborators across time zones

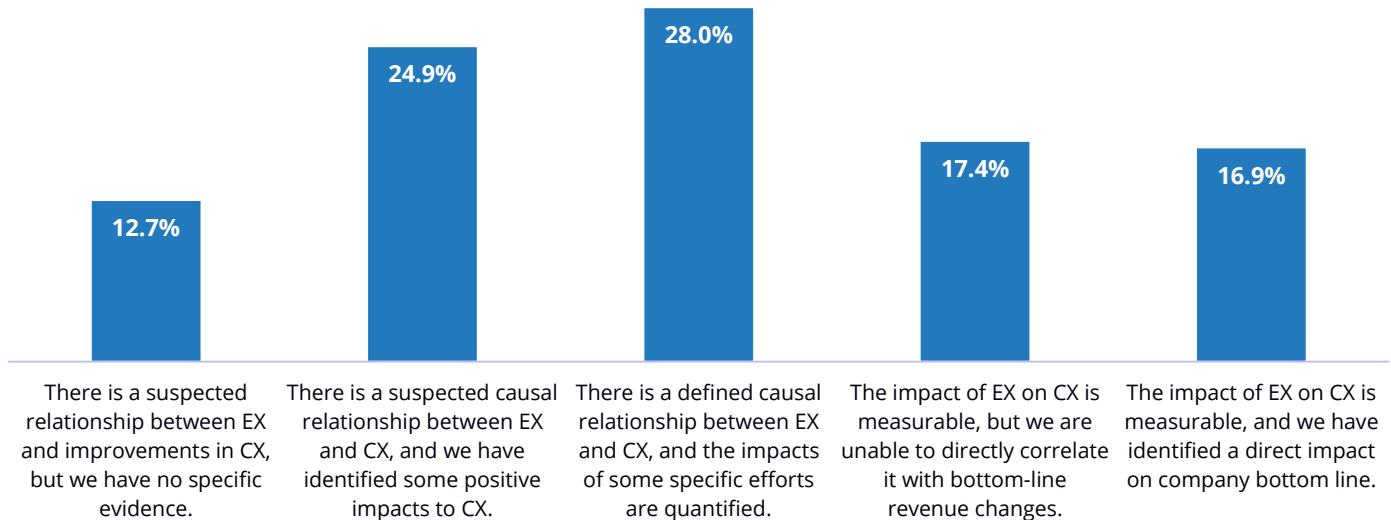
- » Omni-channel access across devices to work securely and seamlessly
- » Integrated in-application user experiences that eliminate context switching between applications

From an IT perspective, investing in a strong user experience has evolved from reactive support for remote work to the proactive design of intelligent digital workspaces. "Intelligent workspaces" are digital environments that allow employees to connect seamlessly and securely with the critical resources they need, whether they are working remotely or at their work site. By offering employees the option of using an intelligent digital workspace that lets them work from any location and across many devices, organizations reap the benefits of:

- » Access to a highly qualified talent pool and the retention of top talent
- » Ability to offer continuous development guidance into the flow of work
- » Increased automation and greater productivity
- » Better customer experience, higher customer satisfaction, and higher revenue

According to *IDC FutureScape: Top 10 Predictions for the Future of Customer Experience*, by 2026, 40% of Global 2000 enterprises will incorporate employee experience initiatives into their core customer experience strategies to compete in customer experience, talent acquisition, and retention. In IDC's December 2022 *Future Enterprise Resiliency and Spending Survey, Wave 11*, 87% of business and IT leader respondents (n = 840) noted a suspected or defined causal relationship between EX and CX, in which improved employee experience leads to improved customer experience (see Figure 3). Organizations with a clear and measurable EX status are more likely to be able to correlate EX and CX levels.

FIGURE 3: **Impact on Customer Experience by Improving Employee Experience (% of Respondents)**



n = 840

Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 11, December 2022*

Considering Catchpoint

Catchpoint is an internet performance monitoring (IPM) industry player that helps organizations deliver an optimum user experience through advanced monitoring of network and internet performance, designed to ensure customers and employees have the experience they expect when using key applications — no matter their location. Catchpoint's cloud-native global IPM suite covers five major solutions: Customer Experience, Network Experience, Application Experience, Website Experience, and Workforce Experience. The company's IPM platform is intended to give users real-time data to identify, pinpoint, and fix problems and turn those problems into actionable insights before they impact the business.

Catchpoint's Workforce Experience solution directly applies to the future of work/hybrid work domain, ensuring employees can connect and work from anywhere. To help businesses thrive in a hybrid workplace, this solution is designed to support employees with the information they rely on, including end-to-end insights into the user experience of the applications they use daily. The Workforce Experience solution also provides the insights required to detect and troubleshoot remote connectivity performance and software-as-a-service (SaaS) issues before they impact the workforce. The result is improved employee productivity, enhanced employee experience and retention, fewer IT tickets, and improved customer experience.

Catchpoint's Workforce Experience solution includes:

- » **Workforce Experience Monitoring.** This feature enables organizations to understand and troubleshoot connectivity and reachability issues no matter where their workforce is, enhancing employee experience and improving workforce productivity at scale. It provides a "Workforce Experience" metric that can serve as a general indicator of worker satisfaction as well as an alert when that value drops. The solution is designed to ensure a smooth desktop-as-a-service (DaaS) experience environment by monitoring employee devices and measuring employee experience from the point of view of digital performance. By leveraging Catchpoint's unique global observability network, IT can trace a worker's journey from an "outside-in" perspective to understand where issues are occurring.
- » **SaaS Application Monitoring.** Organizations are looking to replace legacy solutions with modern digital platforms to drive business agility and are adopting SaaS solutions. Catchpoint's SaaS application monitoring feature is designed to help these companies manage SaaS performance for their hybrid workforce and gain visibility into the performance of business-critical SaaS applications on which the workforce relies, such as Microsoft 365 and Salesforce, in addition to VoIP/video tools such as Teams and Zoom. This capability resolves SaaS issues faster with Catchpoint's AI-powered dashboards and visualizations capable of providing actionable insights to evaluate the performance of different SaaS applications for different employees.
- » **Cloud Migration.** This offering is designed to help organizations in different regions identify and seamlessly migrate to the cloud vendor that best serves a specific workforce and continually optimize post-migration. As a result, organizations can select the best cloud vendor for their needs by understanding the employee and customer experiences across regions and across the cloud journey.
- » **SASE and VPN Monitoring.** This capability finds and fixes employees' SASE and VPN issues fast while improving operations. It is designed to prevent repeat and duplicate tickets with proactive alerting and to empower remote workers to self-remediate issues. It also allows IT to deliver faster response times by identifying slow-running components and optimizing application performance.

Challenges

To address changing work models, organizations have accelerated initiatives to move employee-facing applications to the cloud and adopted desktop virtualization to better manage their distributed employee base. Many vendors are focused on enhancing user experience and handling connectivity issues, each coming from a slightly different entry point, but all competing to define the space and the value of their respective offerings. Catchpoint's IPM focus and global observability network put the company in a good position to take on the challenge of providing real-time data to pinpoint and fix problems and turn those problems into actionable insights, based on the robustness of its workforce and customer experience portfolio, partnerships, and broader company offerings.

Conclusion

The rapid shift to hybrid work models that enable employees to work from any location on any device and in any time zone is driving widescale adoption of intelligent digital technologies, which are underpinned by the crucial resource of technical connectivity. Organizations are investing heavily in connectivity, cloud technologies, collaborative workspaces, and automation, as well as talent development strategies, as these programs will help improve employee experience, ensure operational resilience, and bolster overall productivity. As networks evolve and businesses scale, enterprise network and IT departments must align systems and processes to ensure that business continuity is maintained, employees are productive, and organizations can adapt to business demands with connectivity anytime, anywhere, and from any location.

Technical connectivity, collaboration, and open communication from employers are key to building a strong employee experience.

About the Analysts



Anu Mehta, Senior Research Analyst, Future of Work

Anu Mehta is a Senior Research Analyst in IDC's worldwide Future of Work Agenda market research service. In this role, she is focused on expanding the research portfolio around frontline workers, industry comparative assessments, hybrid work maturity and flexible work models. Ms. Mehta's research supports IDC's three Future of Work pillars: culture, space, and augmentation.



Amy Loomis, Ph.D., Research Vice President, Future of Work

Amy Loomis is Research Vice President for IDC's worldwide Future of Work market research service. In this role, Ms. Loomis covers the growing influence of technologies such as artificial intelligence, data analytics, robotics, augmented and virtual reality, and intelligent process automation in changing the nature of work. Her research looks at how these technologies influence workers' skills and behaviors, organizational culture, and worker experience and how the workspace itself is enabling the future enterprise.

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