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THE FUTURE OF WORK IN
The New Normal

Re-thinking your Digital Priorities

THE EMERGENCE OF
The New Normal

> *The COVID-19 pandemic disrupted the workplace, forcing organisations to accommodate a large remote workforce. Business and IT decision-makers have had to very quickly re-think their strategies and investments to ensure communication and collaboration can continue against this backdrop.*

While many organisations have a business continuity plan, global businesses had not expected the scale of disruption. Ecosystm research finds that 38% of organisations in Asia Pacific were forced to refocus their Digital Transformation (DX) initiatives while 25% had to accelerate their DX. Many organisations are in the process of re-defining what the new norm will be for their future workplace. HR Managers, IT and Facilities Management continue to have discussions on the blended model, the IT support needed for employees, cybersecurity measures to keep data secure, technologies that will be critical for the future workplace and if there will be a need at all for commercial office space. Organisations are experimenting with different work models and it is still unclear what the Workplace of the Future will look like. What is clear is that it will not be the same as before COVID-19.

This whitepaper, commissioned by Poly, discusses the key priorities of business and IT leaders in Asia Pacific as a New Normal emerges and provides guidance to enterprises on how to negotiate the changes in their business and employee engagement models. The data cited is from the ongoing Ecosystm Digital Priorities in the New Normal study that evaluates the business and technological impact of COVID-19. Due to Ecosystm's model of continuous data collection, it has over 800 responses from technology leaders in Asia Pacific till date and continues to receive feedback. Technology leaders can access this research in real-time to benchmark themselves against the responses of their peer community (see Appendix).

Key Future Workplace Trends

#1 The Blended/Hybrid Work Model is Here to Stay

> **40%** *of organisations expect a continued use of virtual meetings, even after COVID-19 — irrespective of the location of the employees*

Working from home will become the norm for medium-sized, large and well-established organisations planning on reducing their spend on commercial office space. For organisations that choose to keep physical offices, the use of office space will change drastically. There will be an effort to reduce the actual office space, and workplaces will be fitted out differently catering to the need to meet and collaborate on projects. Even if this move to reduce physical office space does not become mainstream, organisations will have to repurpose or redesign the workspaces. In Australia for example, several large organisations have announced that working from home will be a common feature and will continue even after the pandemic. Across the Philippines and India, the business process outsourcing (BPO) providers are piloting different models by having some employees work from home and some in the office. Organisations are still experimenting to find the right model that will cater to their individual needs.
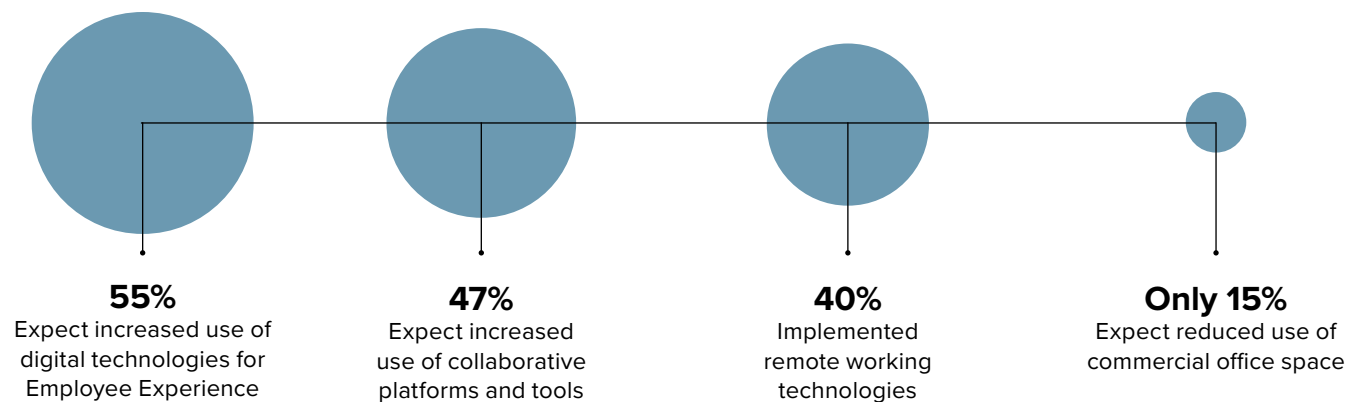
The number of people physically attending a meeting will reduce, with some opting to continue to interact through video and collaboration solutions. There will be a need to have smaller huddle rooms for when colleagues choose to interact face-to-face - these huddle rooms will be fitted with high quality videoconferencing systems. Employees will increasingly have the option of working either from the office or at home. IT, HR, and Facilities Management will need to cater to these changes, starting with a revamping of HR policies.

Organisations that choose to reduce their physical footprint will realise significant cost savings on real estate, especially in cities where the offices are in prestigious, central locations.

While working from home has become the norm, and organisations will evaluate how to reduce real estate costs, a large proportion of organisations may feel the need to maintain a central space. In some instances, organisations will invest in setting up smaller satellite offices in the suburbs for a more flexible and collaborative workplace. The balance and the mix of these facilities will differ by organisations depending on the nature of work. But it is a certainty that the Hybrid/Blended model of work is here to stay.

Not many organisations are ready to make the decision on reducing commercial space. Only 15% of business leaders in Asia Pacific state they will reduce investments in the physical office (Figure 1). In comparison, a high percentage will continue to focus on collaborative applications and cater for virtual meetings even after the crisis is over. Organisations clearly want to be better prepared for future crises and ensure minimal disruption in delivery. These investments are part of the organisation's Business Continuity Planning (BCP). Business and IT leaders want to be ''ready and fully prepared'' for future eventualities - business must go on as usual!

FIGURE 1
Measures Expected to Remain after the COVID-19 Crisis is Over

55%
Expect increased use of digital technologies for Employee Experience

47%
Expect increased use of collaborative platforms and tools

40%
Implemented remote working technologies

Only 15%
Expect reduced use of commercial office space

Source: Ecosystm Digital Priorities in the New Normal Study
N=376

ENABLING A
Hybrid Workforce

Australian software development and project management firm Atlassian will let employees choose to work from home indefinitely, and will eventually reopen offices for workers who want to go back. Atlassian employees can choose to work wherever they want, whether at home, in an office, or a combination of the two.

Slack announced that it will give employees the option to work remotely forever. They stated that employees will have the option to work remotely on a permanent basis if they choose, and the company will begin to increasingly hire employees who are permanently remote.

Facebook expects half of their 50,000 employees to be working remotely within the next 10 years. Twitter and Coinbase announced plans to allow employees to work from home permanently.

The Hybrid/Blended Model of work will also see the rise of the Gig Economy across Asia-Pacific. The concept of self-employment, part-time work, and freelancing, is steadily on the rise. Hiring expert resources on a part-time basis or working remotely will be viewed as more beneficial to the organisation. This will see a continued investment in video, voice, and collaboration solutions to ensure that employee experience is consistent across the board.

Countries that will increase use of technology for better Employee Experience

AUSTRALIA
61%

INDIA
60%

SINGAPORE
60%

Country that will invest most on collaborative platform & tools

NEW ZEALAND
56%

#2 Organisations will Focus on Making Remote Working Possible

Only 31% *of organisations focused on emotional well-being of employees during the crisis – Technology and HR Teams must pay attention to employee well-being when enabling a remote workforce*

Supporting remote employees can be a challenging task, especially since most organisations were not prepared for the suddenness and the scale of the pandemic. In some emerging economies, basic connectivity has been an issue. Unstable network connectivity meant immediate investments in devices to improve internet speed, and these investments were not part of the planned IT budget. Unstable network connectivity also hampered back-end processing functions which led to delays in critical output and processing times. It also hampered the quality of communication and collaboration.
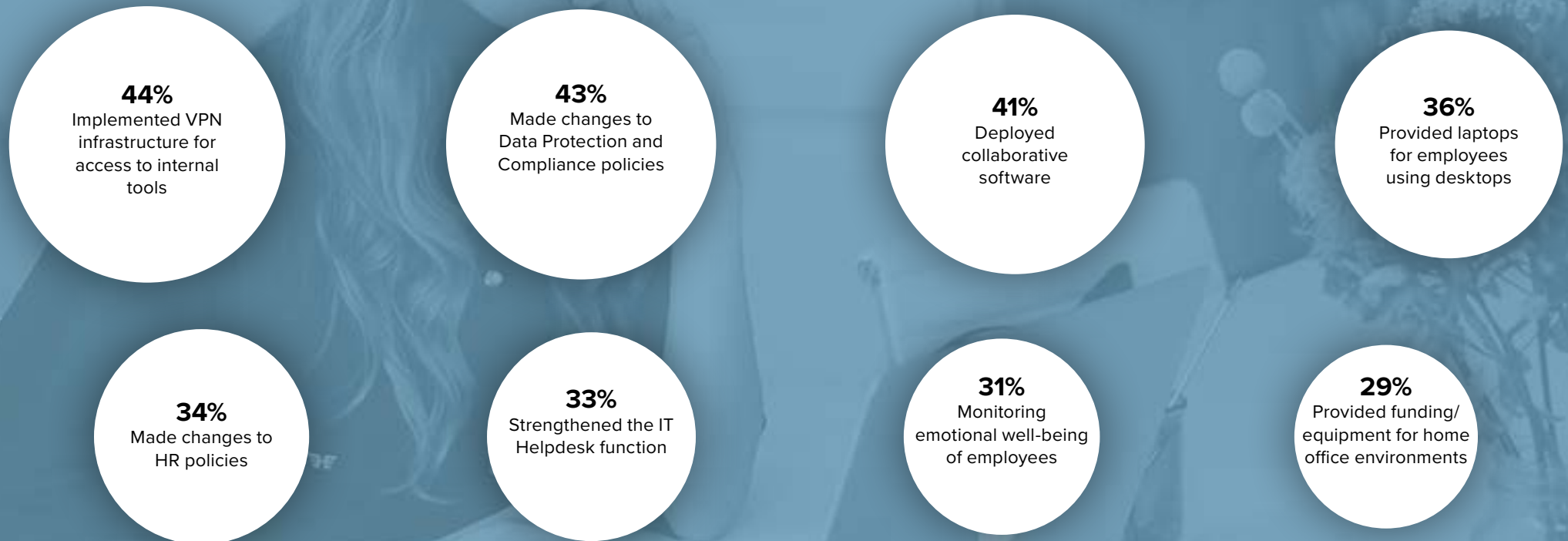
Organisations initiated a series of measures to facilitate remote working. Ecosystm research finds that the leading measure to enable remote working in Asia Pacific was implementing VPN access to allow employees access to internal tools. (Figure 2). Although VPN usage has been common for a while, the deployments have been for remote employees, and before COVID-19 that remote workforce was not as significant. VPNs provides devices an added layer of security for a private internet connection. In some instances, employees had to access confidential files, customer data and multiple internal systems from the office server, and immediately securing that access became critical.

The investments in security, networking and infrastructure technologies were critical for ease of implementation of video and collaboration technologies. Many organisations had to also make basic investments in laptops and collaborative software during this crisis. Across several countries in Asia Pacific - and mainly in the emerging economies - employees were just not equipped to work effectively from home. Laptops, monitors and headsets had to be purchased for the home environment.

However, some organisations have gone beyond the basics and made more proactive changes such as revamping their data protection and compliance policies, re-evaluating HR policies and implementing measures to monitor the emotional well-being of their employees. Video, collaboration tools and social messaging platforms have seen high uptake not only for daily work and collaboration, but also to engage with and motivate employees.

FIGURE 2:
Measures to Enable Remote Working - Asia Pacific

44%
Implemented VPN infrastructure for access to internal tools

43%
Made changes to Data Protection and Compliance policies

41%
Deployed collaborative software

36%
Provided laptops for employees using desktops

34%
Made changes to HR policies

33%
Strengthened the IT Helpdesk function

31%
Monitoring emotional well-being of employees

29%
Provided funding/ equipment for home office environments

Source: Ecosystm Digital Priorities in the New Normal Study
N=808

Countries that focused more on evaluating their Data and Compliance practices

INDIA
52%

SINGAPORE
45%

Countries that monitored employee Emotional Health better

INDONESIA
**49%**

INDIA
36%

SINGAPORE
36%

#3 Organisations will Double Down on Cybersecurity Investments and Education

*"**47%** of organisations re-evaluated their cybersecurity risks and measures in the wake of COVID-19, making it a key enabler in enhancing customer and employee experience*

Cybersecurity has emerged at the forefront of IT leaders' minds with the challenges of implementing more cloud-based services, giving data access to remote employees and with the evolving threat landscape exploiting the COVID-19 crisis. Governments across the region, have announced that they have detected persistent and increasing volumes of cyber-attacks by foreign state-based actors on both government and private sector businesses. As more remote devices get connected to business networks, organisations should have a full visibility across all endpoints that access cloud solutions. Today's remote working paradigm requires a strong defensive security posture which ensures that remote services, VPNs, and multi-factor authentication solutions are fully patched and integrated. There is the added complexity of lack of awareness and understanding in the users. A large proportion of remote employees place more importance to being productive than being compliant. IT leaders will complain that bypassing corporate VPNs to access cloud services is common.

Talking about measures implemented to manage the COVID-19 crisis, nearly 50% of IT decision-makers say that they re-evaluated their cybersecurity risks and measures (Figure 3). This has emerged as the key enabler to re-designing digital solutions for better customer engagement and retention, and facilitating a largely remote workforce.

FIGURE 3:
Measures to Enable Remote Working - Asia Pacific

47%
Re-evaluated cybersecurity risks and measures

40%
Implemented digital customer engagement technologies

40%
Implemented remote working technologies
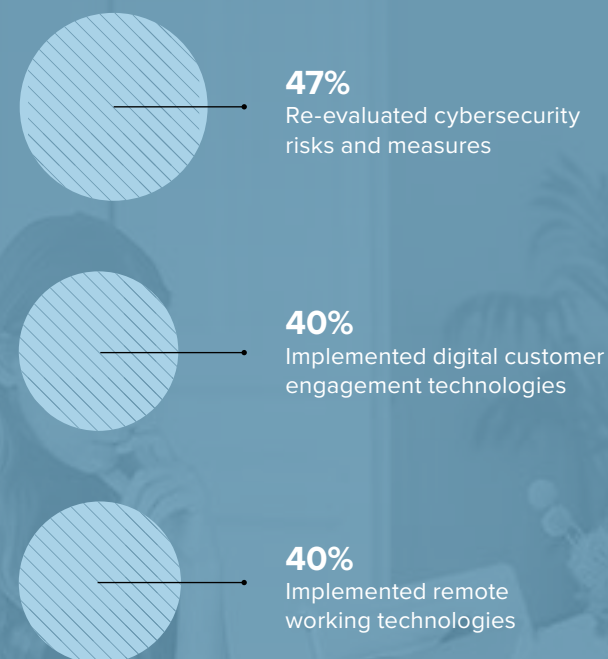
Source: Ecosystm Digital Priorities in the New Normal Study N=808

It is re-assuring that most organisations focused on their cybersecurity infrastructure. However, more needs to be done - and by all organisations. This will impact both customer and employee strategies of an organisation. Re-thinking the best approach to engage and sell to customers is critical in these uncertain times - but customers will want to know that they are accessing a secure system and that their data is safe. This will mean re-evaluating cybersecurity and compliance policies that employees are aware of and follow, when they are working remotely - especially those that have access to critical and protected data.

SECURING YOUR WORK-FROM-ANYWHERE ENVIRONMENT

- *Implementing the right network security and VPN measures*

- *Evaluating the security, back-up and recovery features of cloud applications*

- *Considering a unified endpoint management (UEM) solution for the multiple and dispersed devices being used*

- *Ensuring that conferencing devices have the right security features*

- *Increasing employee awareness of the implication of cybersecurity breaches - for the organisation and the individual*

- *Sharing information about breaches and attempts, with employees to increase their awareness*

- *Evolving the Incident Protocol so that employees know how to respond to a breach*

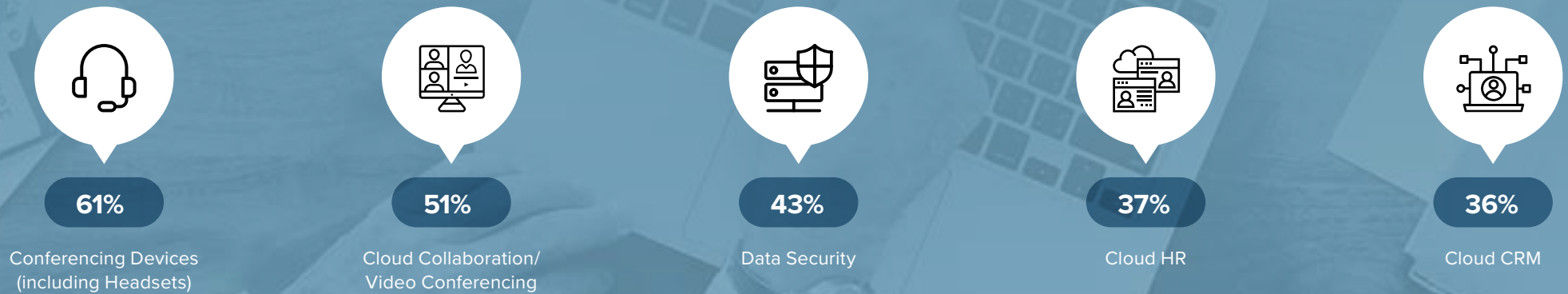# #4 Videoconferencing will Drive Workplace Engagement and Collaboration

> *63% of organisations significantly increased their investments in conferencing devices and headsets to address the collaboration challenges during the COVID-19 crisis - with 41% significantly increasing investments in videoconferencing devices.*

Due to the sharp rise in remote working during the pandemic, nearly every organisation made investments in conferencing technologies. A new trend rapidly emerged - even in organisations where video was not the norm, video became the de-facto standard for daily communication and meetings. There was an increase in use of videoconferencing by individuals, even in their social interactions. Videoconferencing is now the new voice. 63% of organisations in Asia Pacific significantly increased their investments in conferencing devices and headsets to address the collaboration challenges during the COVID-19 crisis - with 41% increasing investments in videoconferencing devices, significantly. This trend is expected to continue as companies move into a blended way of work. Video banking, teleconsultations and online learning have become mainstream. It has also facilitated engagement between supervisors and agents in the customer care sector. These use cases demonstrate how video has become critical in "keeping the business going" and in helping organisations adapt to a new way of doing business. This shift will make businesses re-think how video can be leveraged to not only keep the engagement going but to drive sales; and will have direct impact on both the top and the bottom line.

Additionally, 33% of organisations also increased their investments in cloud video and collaboration solutions. The cloud video adoption will not slow down, and it will continue to permeate organisations of all sizes as it becomes the platform for voice, video and collaboration sessions. Videoconferencing systems packaged for the work from home model will continue to see investments, catering to each worker's unique workspace and persona. Some of these offerings might be bundled with home telecom packages.

What is interesting is that despite the initial investments earlier this year, the demand for videoconferencing devices will not go down over the next 12 months. This is because 41% of Asia Pacific leaders found that while they might have had the right technology, they did not have the scale or capacity to extend these technology offerings to handle the sudden and enormous changes thrust on businesses by the pandemic. Their cybersecurity solutions, cloud business applications, videoconferencing systems and headsets were not sufficient to meet the needs of the remote workforce. As organisations become more conscious of BCP for other eventualities, they will boost their technology capabilities (Figure 4).

FIGURE 4

Top Technologies with Increased Investments in 2020-21 - Asia Pacific

61%

Conferencing Devices
(including Headsets)

51%

Cloud Collaboration/
Video Conferencing

43%

Data Security

37%

Cloud HR

36%

Cloud CRM

Source: Ecosystm Digital Priorities in the New Normal Study
N=376

Countries that will continue to invest heavily in conferencing devices and headsets until 2021

NEW ZEALAND
69%

SINGAPORE
66%

Countries where cloud collaboration & videoconferencing software will see increased investments

INDIA
63%

NEW ZEALAND
63%

SINGAPORE
56%

Videoconferencing
IN THE NEW NORMAL

- *The face-to-face dynamic of video has proven to be engaging with employees working from home, employees on field, external suppliers, and customers. While physical interactions are still important, the pandemic proved how effective remote communication and collaboration can be.*

- *Video has helped drive daily engagement between employees, colleagues, and their managers. Online training and coaching sessions have been made more effective with video.*

- *During the crisis, Sales and Marketing were able to drive customer engagements through virtual video meetings. A new trend that has emerged is virtual roundtables, which supported organisations' go-to-market initiatives and ensured a continued engagement with the market.*

- *With the high use of video, HR and Management are questioning if travel is necessary and corporate travel might be evaluated closely in the future. Many organisations consider the reduction of travel expenses during the pandemic an incidental benefit.*

- *Videoconferencing does not come without its challenges. The quality of the engagements is often defined by network connectivity and the quality of headsets. Headsets have become particularly important in a home environment, given the surrounding noise. Organisations should focus on investing on enterprise grade headsets to cater to different personas in terms of preference, style, and overall fit. IT can monitor the performance of the headsets in real time, and by analysing the data can identify the issues that need to be resolved. This analytics can be used to push patches to distributed teams easily.*

- *Video solutions will continue to evolve. For example, video bars designed for small rooms and remote spaces provide a high-quality room video experience. These solutions are easy to set up and offer in-built AI and machine learning capabilities for audio and video experiences.*

WHAT ORGANISATIONS SHOULD BE
Evaluating

Re-designing and re-inventing the way people work should remain a focus area. The CEO and the Management team will have to drive a new culture and the culture must drive efficiency and productivity. As economies recover, newer trends will emerge such as flexible working hours, and hiring global talents. Organisations will re-evaluate their traditional operating model. Increasingly they will try to create the right network of employees - irrespective of their location - and empower them with the right technologies.

Adapting to the Future of Work
IN THE NEW NORMAL

- *The Blended working model is the New Normal. Various work models are being piloted by HR, and organisations will have to evaluate what the right mix is, for their work needs.*

- *Some organisations will closely monitor their real estate needs. There will be a need to weigh the pros and cons of that decision.*

- *Irrespective of the decision to retain or give up office space, organisations will need to re-think the design and use of the physical workspace. Facilities Management should work closely with HR and IT to define the right design of the workplace.*

- *Even after this crisis is over, organisations should continue to drive better employee experience. This will include considerations on reimbursing costs incurred for network and mobile usage. This should also include monitoring the emotional wellbeing of employees.*

- *Organisations must not stop with their initial and ad-hoc technology investments. There is a need to evaluate whether their technology capabilities will be sufficient should they face another crisis. This is especially true of technologies such as collaboration software and videoconferencing devices, where the investments have been largely reactive.*

- *Organisations should continue to re-think how they can leverage their videoconferencing solutions, collaboration platforms, social messaging solutions and customer engagement applications to drive communication and daily collaboration. All solutions should be underpinned with robust security features.*

- *There will be an emergence of a new breed of employees. The flexibility of the blended work model will give rise to new talent that will include freelancers and part-timers. This will require a re-think of technology investments and HR policies. Trust has to be built into the organisational policy.*

Ecosystm Digital Priorities in the New Normal Study

ORGANISATION PROFILE

Mature Economies

- 16% Australia
- 15% Singapore
- 9% South Korea
- 7% Hong Kong
- 7% New Zealand

Emerging Economies

- 15% India
- 8% Indonesia
- 8% Thailand
- 8% Malaysia
- 6% Philippines

ORGANISATION PROFILE - INDUSTRY

- 17% Financial Services
- 15% Public Sector
- 13% Retail, Distribution & CPG
- 12% Telecom & Media
- 11% Manufacturing
- 8% Services
- 7% Health & Life Sciences
- 6% Transportation
- 5% Energy & Utilities
- 5% Resource & Primary

ORGANISATION PROFILE - SIZE

- 43% Enterprise (1,000 or more)
- 38% Large (500-999)
- 19% Medium (100-499)

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One of the foremost multi-disciplinary analysts in the APAC region, Audrey boasts an eclectic set of expertise, in segments as diverse as enterprise collaboration, unified communications-as-a-service (UCaaS), video, contact center, CX, outsourcing as well as artificial intelligence, enterprise mobility and digital transformation.

Audrey has a proven track record both as an analyst and a business leader, having spent close to two decades in various analyst roles at Frost & Sullivan, providing counsel to C-level executives on go-to-market strategies – most recently as Head of Research and Senior Fellow at the firm's ICT practice in Australia and New Zealand. As one of the pioneers of the firm in the region, Audrey played a pivotal role in its regional expansion, including building and mentoring a team of analysts across various markets in Asia-Pacific, including Malaysia, Singapore and Australia.

Beyond her involvement as an analyst, Audrey is also a prominent keynote speaker, having delivered over 150 speaking engagements addressing various technology segments. She is regularly quoted in the media for her insights into ongoing technology trends and news.

Audrey is an honours graduate from the Institute of Chartered Secretaries and Administration (ICSA) in the UK. She also holds Diplomas in Management Accounting and Financial Accounting from the London Chamber of Commerce Institute (LCCI). In her free time, she loves to read literary fiction and is a jazz enthusiast.

About
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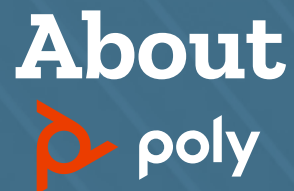
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About
ecosystm

Ecosystm is a private equity backed Digital Research and Advisory Platform with global headquarters in Singapore.

As a global first, Ecosystm brings together tech buyers, tech vendors and analysts into one integrated platform to enable the best decision making in the evolving digital economy. The firm moves away from the highly inefficient business models of traditional research firms and instead focuses on research democratisation, with an emphasis on accessibility, transparency and autonomy.

Ecosystm's research originates from its custom designed "Peer-2-Peer" platform which allows Tech Buyers to benchmark their organisation in "real-time" against their industry or market.

This bold new research paradigm enables Ecosystm to provide Tech Vendors access to ongoing and real time Market Insights in an affordable "as-a-Service" subscription model.