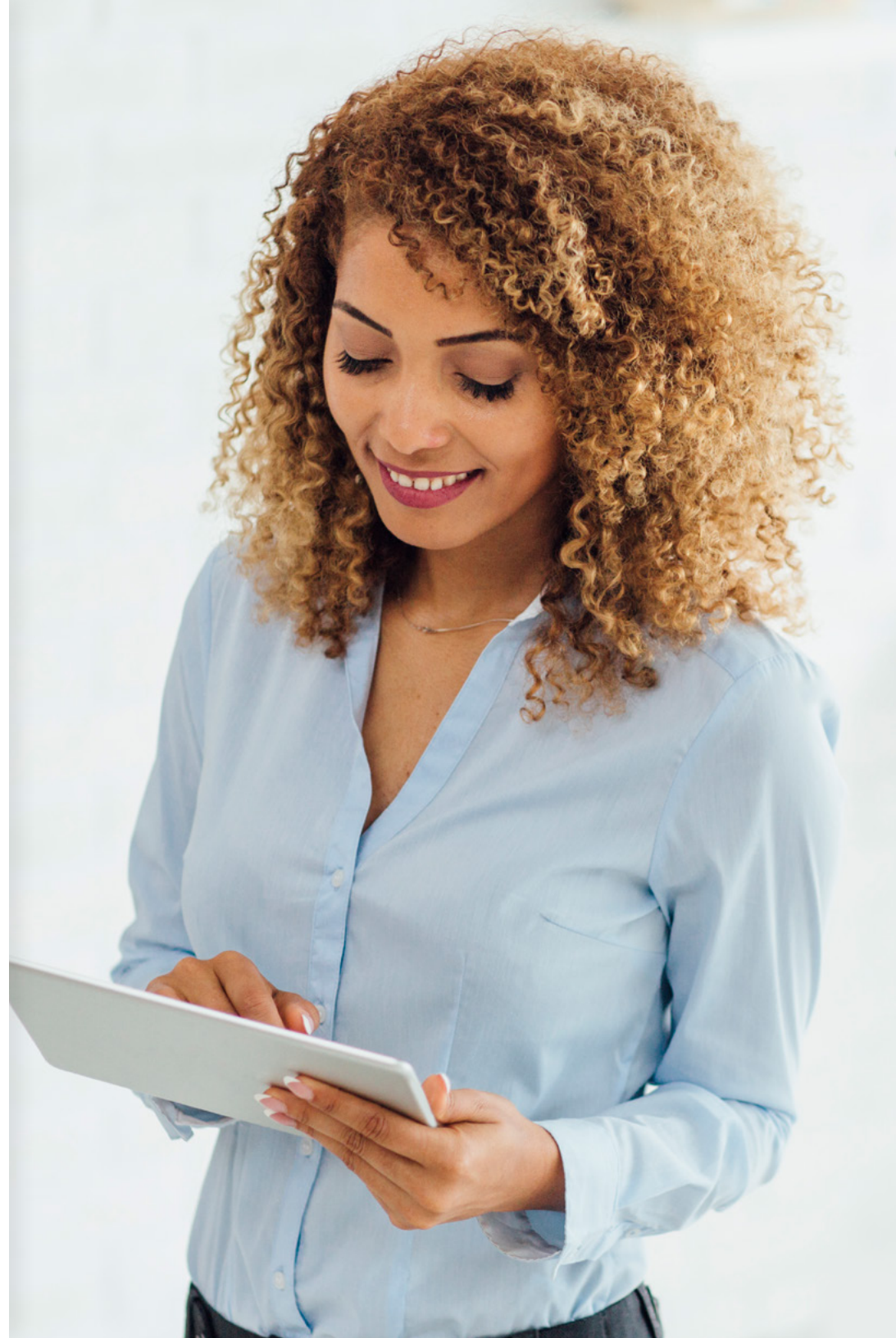




THE FUTURE OF WORK AND COLLABORATION

The continuing impact of the
pandemic on the world of work





An undeniable impact of the ongoing pandemic has been the shifting workplace. In response to the various government restrictions across Canada, organizations and employees alike had to pivot and adapt to the evolved workplace demands. The resulting shifts highlighted several implications for the future of work and remote job performance – a major consideration being the change in collaboration as employees were forced online to communicate rather than in-office conversations.

CDW commissioned a survey in partnership with Angus Reid to analyze the sentiment of Canadian IT professionals with respect to the future of work and collaboration among employees before, during and beyond the pandemic. The findings offer valuable insight into the shifting work environment and how IT professionals are simultaneously supporting organizational needs while preparing for the workplace of the future.

Amid the mass transition to remote work, organizations needed new avenues to keep communication lines open and maintain personal connections between coworkers. As a result, organizations leveraged technology tools and solutions to enable effective and meaningful collaboration while ensuring business continuity at a pace never seen before. While these tools were being leveraged by organizations before the pandemic, the crisis highlighted and heightened their value, positioning them as a critical aspect of business solutions moving forward.

Today, 'work-from-home' has quickly become a norm with collaboration tools to help employees navigate the virtual work environment. However, this new working model presents its challenges as budget constraints remain a barrier to the adoption of relevant technology and IT support. Furthermore, collaboration tools in our largely remote environment present new areas of vulnerability for cybersecurity incidents at an organization. As Canadian organizations continue to rely on these collaboration tools, there is a need to assess the impact of investment to ensure continuous advancements in the workplace today – and for years to come.



CDW's Key Findings:

- Our survey found the vast majority of IT professionals (93 percent) believe their organization appreciates the value of evolving technology and the tools available to provide employees with seamless communication.
- In the transition to remote work, two-thirds of organizations (66 percent) experienced an interruption to workplace collaboration of varying degrees (minor – 48 percent; some – 16 percent; significant – 2 percent); only one-third of organizations were able to maintain seamless connection.
- Unsurprisingly, our survey found that most organizations (92 percent) leverage collaboration tools amid the pandemic, compared to 66 percent pre-pandemic.
- Organizational data breaches remain a concern for IT professionals. Our survey found that 64 percent of respondents with newly adopted collaboration tools are somewhat (44 percent) or very (19 percent) concerned about the potential for data breaches – one-third of these respondents are even more concerned compared to prior to the pandemic.
- Most organizations are reaping the benefits of the collaboration tools they use. The survey found that 80 percent are benefitting from these tools to some degree, while 20 percent are benefitting from some or not at all.
- While the pandemic accelerated organizational investments in collaborative tools, 40 percent of IT professionals stated they believe employees are more collaborative compared to before the pandemic. However, the 40 percent believe these technologies have had no impact on the connectedness of employees.
- Interestingly, resistance factors faced by organizations when looking to invest in collaboration tools or technology remain largely unchanged amid the pandemic in comparison to before. Budget constraints continue to impact the adoption of collaboration tools (49 percent before the pandemic compared to 40 percent during), as 46 percent of respondents expect this to be the biggest challenge in the future.
- The perceived impact of newly adopted collaboration tools and solutions on employees varied significantly. More than one-third of respondents (38 percent) feel they are more productive, while 29 percent believe they are less productive. Additionally, nearly two-thirds (65 percent) of the respondents feel employees are growing more fatigued, compared to nine percent who do not believe they are.



What is driving the change?

The traditional office environment of the past is set to see a dramatic change when the pandemic subsides. While some will certainly return to a physical location, the pandemic has offered an alternative as organizations were forced to work remotely and adopt collaboration tools to foster business continuity in this environment. While the world of work had evolved significantly in recent years with digitization as a key driver, the pandemic forced adoption.

Fortunately, this change has been largely successful for Canadian organizations. Our survey found that two-thirds of respondents (66 percent) indicated they experienced varying degrees of interruption in workplace collaboration amid the transition to working from home but quickly enabled collaboration tools for employees.

In providing solutions to support employee adaptation amid the challenging landscape, the role of evolving technology and collaborative solutions cannot be overemphasized. Thankfully, our survey found that nearly all respondents (93 percent) believe their organization recognizes the value in these factors and the fact that they are crucial to the success of work – both today and tomorrow.



Collaboration in the new workplace and beyond

Workplace collaboration continues to evolve rapidly as new solutions are developed and employees grow more accustomed to the current environment and come to expect the same level of collaboration. Leveraging these solutions, organizations increasingly enable workers to maintain communication outside of the traditional work setting. As a result of this, a significant shift occurred in organizations' appetite for using collaboration tools (from 66 percent pre-pandemic to 92 percent amid the pandemic).

While our survey found a stark increase in adoption of video conferencing platforms, we similarly saw organizations leverage headsets (42 percent), mobile phones (41 percent) and increased data storage (16 percent) to improve employee collaboration amid the pandemic. IT professionals expect these tools to continue being utilized in the future, albeit to varying degrees as respondents noted 39 percent will continue using headsets, 45 percent will use mobile phones and 21 percent will use increased data storage. The popularity of video conferencing platforms is likely to endure as more than three-quarters (77 percent) noted their organization plans to continue leveraging the tool in the future.

As work has moved from being in a physical location to wherever employees are, organizations will need to adapt and create an environment that supports this reality. Fortunately, our survey reveals 93 percent of IT professionals anticipate their organization will continue leveraging at least one collaboration solution in the future, with 94 percent already leveraging at least one collaboration solution or tool amid the pandemic.

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Furthermore, with 80 percent of respondents attesting to reaping the benefits of collaboration tools, it is now clear that the future of workplace collaboration rests in tools that make it a seamless experience for all stakeholders. The adoption of strong collaborative processes will be critically important to the way organizations and employees navigate the changing world of work.

These tools are also having the effect for which many organizations hoped: two-fifths (40 percent) of respondents noted that employees feel more collaborative. However, two-fifths (40 percent) of respondents also indicated that employees' feelings of connectedness have not changed, while a further 26 percent indicated this sentiment has declined. Organizations need to take note and review collaboration processes to ensure optimal support and meaningful avenues for connection to support employees in this increasingly virtual work climate.



The matter of productivity

Leading remote teams added to the pressures of organizational productivity. More so, the continued adoption of existing and new collaboration technology continues to impact employee productivity.

Our research reveals that 65 percent of respondents perceive employees are increasingly fatigued compared to nine percent of respondents who do not. Despite noting this challenge, the sentiment around employee productivity since the onset of the pandemic is more mixed.

According to our survey, 38 percent of Canadian IT professionals stated that employee productivity has improved, while slightly less than one-third (29 percent) of employees are perceived to be less productive than working in a traditional office environment.



Increase in tools could mean an increase in security risks

While the adoption of collaboration tools and solutions remains essential, this technology isn't without risks. Our survey found nearly two thirds (64 percent) of respondents are concerned about the prospect of a data breach at their organization, with 34 percent more concerned now than before the pandemic. Despite these concerns and the increased potential for security incidents, only one third of organizations have provided additional cybersecurity training amid the pandemic.

Our survey found over half (51 percent) of respondents noted they provided regular training before the pandemic. Concerningly, 17 percent claimed their organization doesn't provide training for employees.

As the first line of defence against a cyberincident, employee training is critical to maintaining security for your private information. While employees should be given regular training of common threats and how to maintain vigilance, the training should be relevant to the current landscape.



Common barriers to adoption persist

As the need for digital transformation and employee engagement continues to increase, IT professionals continue to face challenges when looking to invest in collaboration tools or technology. Although our survey found that many common barriers decreased amid the pandemic, some respondents expect these barriers to return to previous levels when the pandemic eventually subsides.

We found that budget constraints remain the greatest resistance factor (49 percent pre-pandemic, 40 percent amid the pandemic) while nearly half (46 percent) anticipate this will continue to be a top barrier to adoption in the future. Similarly, the perceived complexity of projects remains the second highest resistance factor (26 percent pre-pandemic, 25 percent amid the pandemic). Lastly, not knowing where to start remains the lowest resistance factor (15 percent both before and during the pandemic).

Despite these barriers, the workplace will continue to evolve as employees grow accustomed to working remotely. Although the office and workplace of the future remains to be seen, organizations need to realize that employees will play a central role in dictating what this reality will be. As we look to the future, 53 percent of respondents believe the workplace of the future will be a mix of hybrid and remote, while only 17 percent believe employees will be expected to return to the office fulltime. This shows that despite the circumstances, employees have grown accustomed to collaboration tools and being outside of the traditional office environment. Thankfully, IT professionals believe their organization will enable the office of the future – 87 percent believe their organization will have most or all of the appropriate meeting room devices in place to enable collaboration when employees return to the office in some capacity.



WHAT WE'RE SEEING IN DIFFERENT INDUSTRIES



Business and Professional Services

The business and professional services sector appears to be the most forward-looking sector when leveraging advancements to provide employees with seamless tools for communication and collaboration. Of those surveyed, more than three-quarters (77 percent) used collaboration tools to facilitate business operations pre-pandemic with an impressive increase to 97 percent amid the pandemic. Looking onward, IT professionals within this sector are confident the majority of employees (95 percent) will continue using collaboration tools in the future. Likewise, the sector's investments in technological capabilities seems to yield results, as our study shows that when employees needed to transition quickly to a work-from-home model, more than half (54 percent) had no interruption of service during the transition – well above the average of 36 percent among all industries.

Certainly, investing in collaborative technology – or any new technology – is not without its hurdles. IT professionals expect to face various forms of resistance, with 40 percent of respondents citing budget constraints as a significant barrier to investing in collaboration tools. In terms of the increasing adoption of collaboration tools and solutions, 65 percent of IT professionals perceive employees are a bit more fatigued, well above the average of 45 percent among all industries.



Financial Services

Our survey results found that 86 percent of IT professionals in financial services use collaboration tools at their organizations amid the pandemic. Additionally, nearly all (93 percent) anticipate continued use of these tools in the future. Prior to the pandemic, only seven percent of employees worked from home, with 12 percent working from home three to four days per week and 19 percent doing so one to two days per week – the highest among all respondents.

Looking to the future, over three quarters of IT professionals (78 percent) anticipate a hybrid work environment, with only 12 percent indicating that employees may still work from home but will largely be returning to the office, well below the average of 25 percent.

While nearly three quarters (70 percent) of organizations in this sector are benefitting from the adoption of collaboration tools, the industry faces several challenges. IT professionals within this sector are very concerned about the prospect of a data breach, with more than half (58 percent) being somewhat concerned, accounting for the highest among all respondents.

Thankfully, in response to the increased levels of concern over one-third (38 percent) noted their organization has provided increased cybersecurity training amid the pandemic.



Education

Among the IT professionals surveyed, more than half (54 percent) noted that employees rarely worked from home before the pandemic, compared to during the pandemic when the 54 percent worked from home most or all the time. These educational institutions are leveraging a variety of collaboration tools, most significantly video conferencing platforms (82 percent).

Furthermore, as a result of the collaboration tools adopted during the pandemic, 38 percent of respondents believe employees are more connected. Conversely, the same percentage indicated that employees are feeling more fatigued. This sector is also the least concerned about the potential for an organizational data breach, as only nine percent express a deep concern for data security.

In terms of the future of work, this sector has high expectations that employees will continue to leverage various collaboration tools as IT respondents express certainty in the continuous use of video platforms (80 percent) and laptops (69 percent). When the pandemic eventually subsides, nearly half (45 percent) of respondents believe employees will be expected to return to the office full-time – the highest of all respondents and well above the average of 17 percent.



Government

Government IT professionals have historically encountered various forms of resistance to change and technology advancement. Hence, as the COVID-19 cases increased, the transition to remote work resulted in challenges for the sector. Our survey found that only 5 percent of employees worked exclusively from home prior to the pandemic, while 58 percent of employees rarely worked from home. The survey found that only 20 percent noted they had no interruption in the transition to working from home – the lowest of all respondents and significantly below the average of 36 percent.

Additionally, nearly two-thirds (64 percent) of IT professionals cited budget constraints as a barrier to adoption of collaboration tools pre-pandemic, with 45 percent saying it was a barrier amid the pandemic. Looking to the future, similar barriers are expected to pose a challenge to this sector as more than half (54 percent) of IT professionals anticipate the same budget constraints, with 29 percent unsure of their future needs – the highest of all respondents and above the average of 19 percent.

Analyzing the sentiment of IT professionals in the sector, 38 percent of employees feel more connected as a result of investments in collaboration software. Yet, in comparison to a survey average of 40 percent, 29 percent feel nothing has changed. Despite the sentiment among employees, 79 percent of respondents believe they'll continue leveraging the same collaboration tools in the future, while eight percent believe the tools will change but the investment will not.



Healthcare

In the healthcare sector, survey results indicate a growing reliance on a variety of collaboration tools as 92 percent of IT professionals leverage them amid the pandemic and believe they'll continue using these tools in the future. However, findings also reveal that the use of collaboration software is less likely to improve connections among employees, with only 25 percent of respondents stating employees feel more connected. While half of the respondents do not believe connectedness has changed, the same percentage are confident that employees feel more collaborative in comparison to the survey average of 40 percent.

The pandemic acted as a catalyst to remove barriers that IT professionals faced when looking to invest in collaboration tools or technology. Our survey found that two key barriers, resistance from senior management (24 percent before compared to 11 percent during) and budget constraints (57 percent before compared to 49 percent during) all decreased amid the pandemic, enabling greater adoption of collaboration tools or solutions.

Of the respondents who invested in increased collaboration tools amid the pandemic, nearly two-thirds (62 percent) believe that no significant change to employee productivity has occurred – the highest of all respondents and nearly double the average of 33 percent. Additionally, 50 percent stated that employees are much more fatigued – again the highest across surveyed industries.



Where do we go from here?

In the wake of the pandemic's second wave, new challenges require new considerations as businesses look to optimize business processes and employee performance. To thrive in this new climate and beyond, Canadian organizations must continue to assess the gaps, review solutions and adapt to optimally support the new ways of working. To forge ahead, we recommend these three takeaway points for organizations:

- 1. Collaboration tools and solutions will be critical to business survival.**

Our survey findings show the majority of IT professionals believe the future of work will be increasingly hybrid. While there are several barriers to the adoption of collaboration solutions, tools such as video conferencing platforms, headsets, mobile phones, increased data storage and instant messaging software are anticipated to increase and will be central to the success of hybrid work models.

- 2. Tackle employee fatigue and collaboration challenges.**

Organizations need to prioritize employee well-being and drive connections amid the changing work landscape. Making the necessary adjustment to support employees will not only be good for the people — it is good for business.

- 3. Organizations need to prioritize security infrastructure to prevent risks.**

As technology and the workplace evolve, maintaining reliable remote access will require the regular evaluation and update of security controls. Among other security practices, conducting regular penetration testing and risk assessments can help proactively identify, mitigate and remediate potential security threats.



Our Featured Partners



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