

# Workforce Transformation Strategy: A Spotlight On India

RESULTS FOCUSING ON INDIA FROM THE THOUGHT LEADERSHIP SERIES “WORKFORCE TRANSFORMATION,” WHICH INCLUDES THE COMPONENTS OF WORKFORCE EXPERIENCE, WORKFORCE SECURITY, AND WORKFORCE ENABLEMENT MATURITY IN AUGUST 2016

## Introduction

In August 2016, Dell Technologies commissioned Forrester Consulting to evaluate some of the key challenges, drivers, and trends that businesses are facing to ensure the adoption of workforce enablement technology across Asia Pacific and Japan (APJ). To explore this trend, Forrester conducted a custom study to identify key business priorities, challenges, and methods being adopted across industries. The study included in-depth surveys with 327 senior business and technology executives and end user computing decision-makers in China, India, Japan, Southeast Asia (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand) within their organizations.

To further explore the geographical variations, this spotlight focuses on the trends among 61 IT and business decision-makers in India. When we narrow the focus on workforce transformation trends in India, our key findings are as follows:

- › Improving workforce experience and employee productivity is a critical step in achieving business goals.
- › Employee device security is not adequate, which leads to cost escalations and ends up hurting the overall employee experience.
- › Technology partners will play a critical role in removing some of the burden for non-core PC life-cycle management processes.

## Firms In India Juggle Prioritizing Financial Returns And Elevating Customer Experience

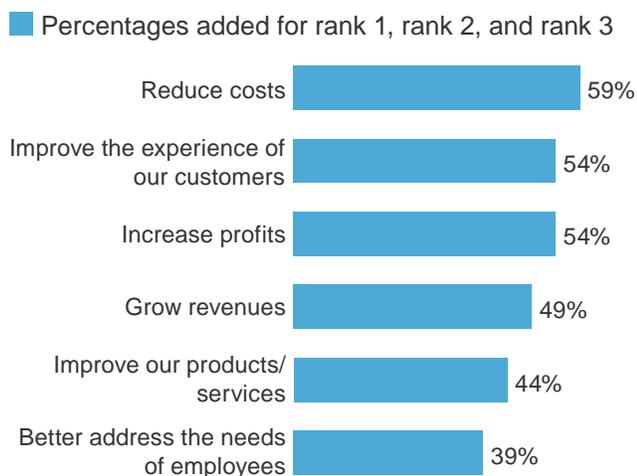
Firms in India are at the crossroads between meeting financial goals and creating a niche for themselves in the new age digital economy. Though India is a developing country, it is also a hub of innovation and technology. Indian firms realize the value of technology and innovation and the importance of constantly improving customer experience better than other developing countries in the region, putting them in a unique position in APJ. Our study reveals some interesting facts:

- › **Indian firms will prioritize maximizing financial returns.** Fifty-nine percent of the business and IT leaders across organizations in India said reducing costs is their topmost priority, while 54% will prioritize increasing profits. Further, 49% of survey respondents in India said that they would like to prioritize growing revenues (see Figure 1).

**FIGURE 1**  
Firms In India Juggle Managing Financial Returns And Improving Customer Experience

“Which of the following initiatives are likely to be your organization’s top business priorities over the next 12 months?”

(Please rank all on the basis of priority)



Base: 61 IT and business decision-makers across organizations in India

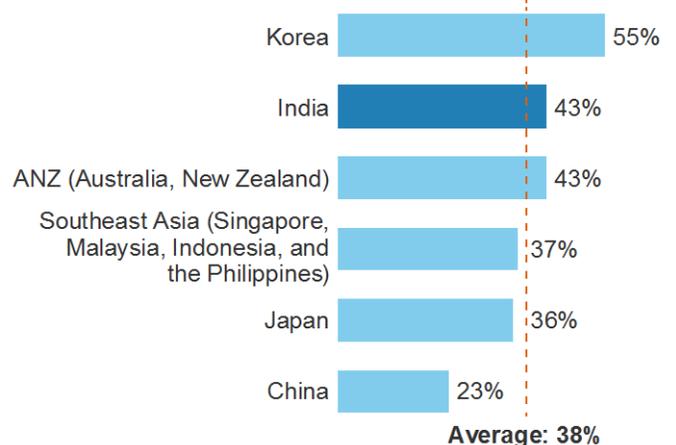
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

- › **Organizations across India will constantly seek to improve the experience of their customers.** More than half of respondents (54%) indicated that their top business priority will be to improve customer experience, while 44% will prioritize improving their products and services to win, serve, and retain customers (see Figure 1). When we asked business and IT leaders in the APJ region how they prioritize improving employee experience within their organizations, 43% of respondents in India (higher than the average 38% for APJ) said that they see employee experience as a critical aspect of achieving their business objectives (see Figure 2).
- › **Improving productivity through better workforce technology is the key to retaining talent.** Thirty-six percent of our survey respondents agreed that investing in workforce technology improves employee experience and productivity, which is the topmost factor helpful in retaining talent. In addition, 34% said that removing barriers to productivity will help organizations to retain talent within their organizations (see Figure 3).

**FIGURE 2**  
India Stands As An Anomaly Among Developing Economies By Rating Improving Employee Experience As A High Priority

“How important do you think it is to improve employee experience to meet business priorities in the next 12 months?”

(1-10 scale with 1 = not important; 5 = medium; 10 = critical)  
(Grouped for 8-10 where 1 = do not understand and 10 = completely understand; on a scale of 1-10)

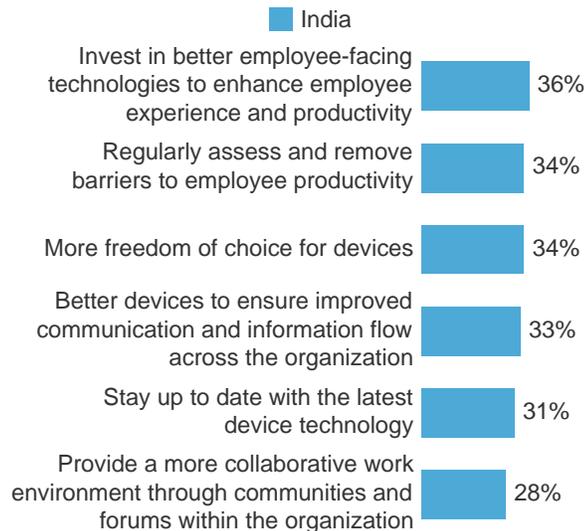


Base: 61 IT and business decision-makers across organizations in India

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

**FIGURE 3**  
**An Increase In Workforce Productivity Will Help Indian Firms Retain Talent**

“Which of the following statements do you agree would help you attract and retain talent in your organization?”



Base: 61 IT and business decision-makers across organizations in India  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

## Current Workforce Technology Is Not Adequately Secure

Workforce technology for most organizations across India is not updated. This has resulted in firms in the region facing several critical security challenges, as borne out by the respondents to our survey. Most security breaches that have occurred in the past 12 months are because of vulnerabilities at the device level: 43% of breaches occurred due to lost/stolen assets by an employee, while 39% occurred due to a security breach of an employee device. There are several other security challenges for the firms across India:

› **Device malware is a critical security challenge.** As malware increases in sophistication and the number of new variants and methods of obfuscation rise, antivirus technologies have become less effective at stopping advanced threats to employee endpoints. Seventy-nine percent of business and IT leaders in India said that device malware is a major concern for their device security, clearly

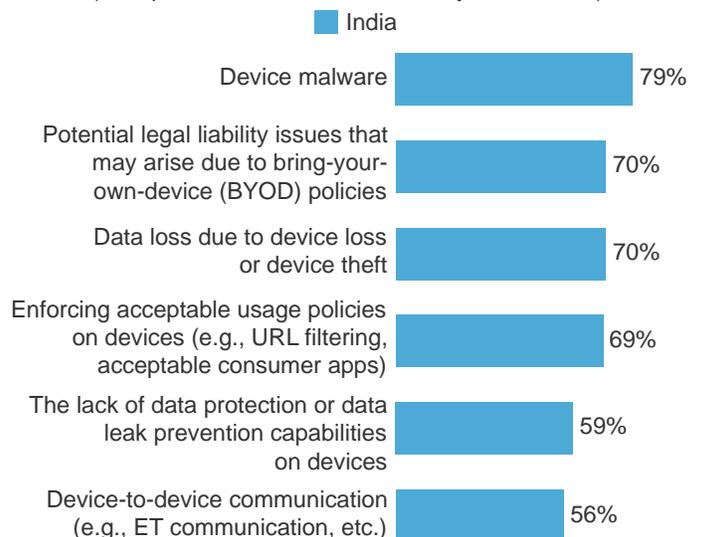
indicating the need for robust and secure antimalware solutions in endpoint strategies (see Figure 4).

› **Endpoint security is vulnerable.** Business and IT leaders in India have several concerns regarding device security. Some arise from policy issues, such as potential legal liabilities due to BYOD policies (70%) and the enforcement of third-party policies for devices (69%). Data loss due to device theft (70%) also remains a critical challenge (see Figure 4).

**FIGURE 4**  
**Devices With Your Employees Face Critical Security Risks**

“How concerned is your firm with the following device security issues?”

(Select one for each row)  
 (Grouped for “concerned” and “very concerned”)

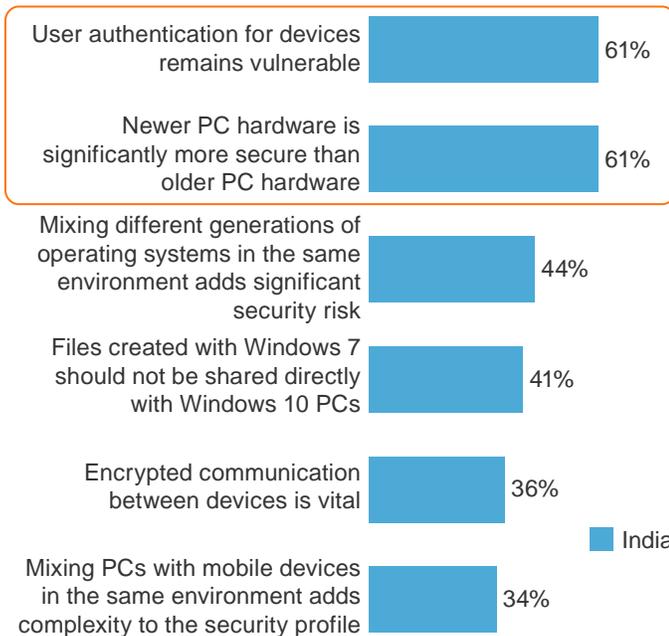


Base: 61 IT and business decision-makers across organizations in India  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

› **Newer PC hardware will significantly improve organizations’ security landscapes.** Most security challenges could be addressed by updating workforce technology to the latest devices. Sixty-one percent of the respondents across industries said that buying newer PCs would significantly reduce security challenges since newer PC hardware would be more secure. This will further help firms address the user authentication challenge. Sixty-one percent of respondents mentioned user authentication is a critical challenge that leaves their devices vulnerable (see Figure 5).

**FIGURE 5**  
**Firms Will Need Improved User Authentication**  
**And Better PC Hardware To Lessen Security**  
**Concerns**

“How strongly do you agree with the following security statements?”  
 (Grouped for “agree” and “strongly agree”)



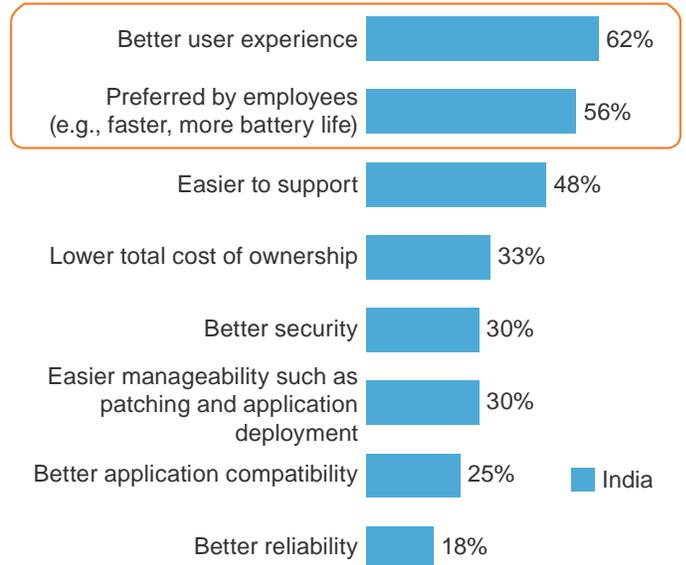
Base: 61 IT and business decision-makers across organizations in India  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

## The Need To Improve Employee Experience Will Be The Catalyst To Change In Workforce Enablement Strategy

Firms in India want to emphasize improved employee experience, which leads to improved productivity, thereby leading them closer to their business objectives. Workforce technology is one of the most important tools to deliver enhanced workforce experience and increases in productivity if mapped accurately to employees' unique requirements. As expected, 62% of the survey respondents in India said that a better user experience is the prime driving force behind new devices, while 56% said that one of the key device demand drivers is employee preference (see Figure 6).

**FIGURE 6**  
**A Need For Improving Workforce Experience Will**  
**Drive The Device Demand In India**

“Which of the following are driving the demand of new device technology in your organization?”  
 (Choose your top three)



Base: 61 IT and business decision-makers across organizations in India  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

There are several critical challenges faced by organizations across India in managing the overall PC life cycle:

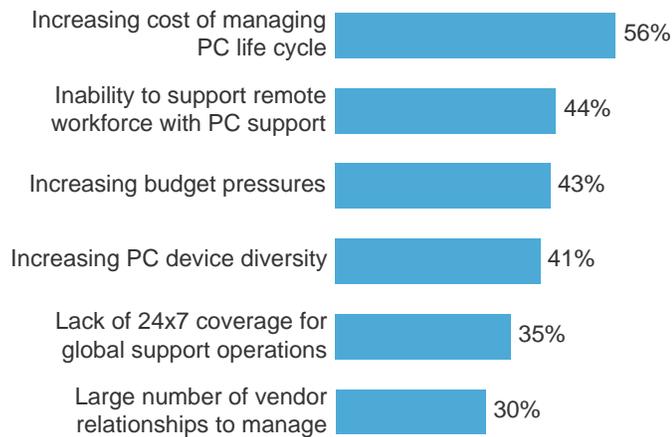
- › **Managing rising costs of PC life-cycle management is a challenge.** Fifty-six percent of the respondents (IT leaders) cited rising costs of PC life-cycle management as a top challenge, while 43% said that increasing budgetary pressures is a critical challenge they face in managing PC life cycles (see Figure 7).
- › **The need for improved IT support has emerged as a top concern.** Forty-four percent of the survey respondents, who are IT leaders in firms across industries in India, said that the inability to support a remote workforce is a top PC life-cycle management challenge, while 35% have found a lack of 24x7 IT support to be a key concern (see Figure 7).

FIGURE 7

### Cost Pressure And Growing Need For Improved IT Support Are The Top PC Life-Cycle Management Challenges

“Which of the following challenges are you currently experiencing regarding PC life-cycle management in your organization?”

(Select all that apply)  
(Respondents = IT decision-makers)



Base: 54 IT decision-makers across organizations in India  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

FIGURE 8

### Scalability And Industry-Specific Experience Are The Key Attributes Firms Look For In A Workforce Technology Service Provider In India

“What are the key attributes of a technology partner to support end user computing at your organization?”

(Select up to five)



Base: 61 IT and business decision-makers across organizations in India  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

In order to overcome these critical challenges and deliver the capability and experience required by their employees to get the job done, Indian firms will look to partner with technology providers for holistic PC life-cycle management solutions. They will look for several key attributes in a provider — 41% said they look for scalability as a top choice, while others look for vertical-specific knowledge (38%) and the ability for cross-geo support (36%) (see Figure 8).

## Key Recommendations

For an effective workforce transformation, companies in India must:

- › **Move budget toward technologies that support the employee needs.** Too much of the technology you give to your employees isn't necessary — or worse, leaves an employee without the tools they need to do their best work. A one-size-fits-all approach means overprovisioning some employees with technology they don't need while leaving others underserved. You must make more informed need-based and role-based decisions to help your employees get the job done in the most efficient manner and keep generating value for your customers. Choose-Your-Own-Device (CYOD) based on the employee personas a device option should be an option you consider.
- › **Assemble a cross-functional workforce experience working group.** Charter a cross-functional group to define your approach to workforce experience and communicate the strategy back to the company as a whole. Initially, a senior executive in company operations or organizational development should co-chair this group because any outreach to the entire workforce generally requires their commitment and support. The chair should be aptly supported by the legal and compliance teams, keeping regional compliance and regulations in mind. Later, an IT leader can take the reins, with periodic review and involvement from the others.
- › **Choose the most secure device hardware.** In general, security measures that operate at the hardware level have the least impact on employee productivity because they're usually transparent to the user while offering superior protection compared with software-only solutions. For example, the Trusted Platform Module (TPM) in commercial-grade PC hardware offers strong encryption to ensure the integrity of the system with no negative impact to the user. Many commercial PCs also offer biometric features that save people time by eliminating the need to type in a password to log in.
- › **Shift support responsibilities outside your company.** There's no way your staff can keep up with all of the variations in technology in a world of bring-your-own-technology (BYOT), so you have to redraw the boundaries of what you do. This means I&O will depend on groups outside of its organization to troubleshoot and fix problems. "Virtualize" certain processes to take advantage of outside resources to help you support your users when technology breaks. And look to external providers for help in managing the complex PC lifecycles in what is quickly becoming a complex, multi-device world.

## Appendix A: Methodology

In this study, Forrester conducted computer-assisted telephone interviewing (CATI) of 327 IT and business decision-makers across organizations in China, India (61 IT and business leaders), Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand) to evaluate key business trends, growth inhibitors, and innovative solutions for workplace security. Survey participants included decision-makers and business leaders in business or IT roles. The study began in August 2016 and was completed in September 2016.