

# Are You Doing Enough To Enable Your Workforce For Success?

## Table Of Contents

Executive Summary.....	1
Key Findings.....	1
Existing Workforce Technology Strategies Do Not Address The Needs Of Employees .....	2
PC Life-Cycle Management Complexities Are Overwhelming For Organizations In APJ.....	5
Firms Do Not Have Adequate In-House Capabilities To Effectively Manage The Workforce PC Life Cycle .....	7
Key Recommendations.....	9
Appendix A: Methodology .....	10
Appendix B: Supplementary Graphs And Demographics .....	10
Appendix C: Endnotes .....	Error! Bookmark not defined.

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## Executive Summary

Infrastructure and operations (I&O) leaders are challenged to inject flexibility back into the IT infrastructure environment and shift from a delivery model. Yesterday's model advanced only an IT agenda — it emphasized efficiency over business value. Today, the goal is simple: Create an environment where employees can access and use the technology they need to do their best work. The future of how companies provide technology for employees is what Forrester calls agile workforce enablement.

**Agile workforce enablement is defined as a deeper understanding of workforce experiences built on virtual and cloud technology and combined with updated processes and enhanced self-service to transform employee engagement and workstyle flexibility.**

Workforce technology strategy must take into account the diverse place and space needs of employees yet encourage and facilitate collaboration and innovation. That's what employees increasingly want. Ensuring employee productivity and even retention will be a top priority for human resource departments and business managers. And CIOs must help with this challenge by providing the tools to better understand and address those diverse needs and requirements. The challenge is how to do all that, especially when workforce technology budgets are always under consistent budgetary pressures.

Business leaders know that to succeed, they need committed and driven employees who understand the value their work delivers to customers and have the right tools to boost their productivity. But attracting and retaining the best talent is a growing challenge, forcing many organizations to look to ideal technology partners that can help them manage device life cycles and, more specifically, PC life cycles.

This research offers critical insights into where high performance and creativity comes from, and how they have an impact on customer experience and profit. With this research, we'll show how to forge a new workforce enablement path and supercharge knowledge workers' productivity and company performance.

In August 2016, Dell commissioned Forrester Consulting to evaluate some of the key challenges, drivers, and trends that businesses are facing to ensure the adoption of effective workforce enablement technology strategy across 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, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand) within their organizations.

## Key Findings

This study yielded a number of key findings:

- › **Business demands more flexibility in workforce technology.** With the increasing availability of more device options and productivity tools and apps, there is a growing need to provide more flexibility and options to the workforce across industries in APJ. It is interesting to note that mature countries such as South Korea and Japan look for better IT support for the workforce, while the emerging economies of India, China, and Southeast Asia look for more device options for their employees.
- › **With an increasingly mobile workforce, constant IT support is a challenge.** IT support has emerged as a major challenge within organizations in APJ. Our research revealed that the challenges are due to a skills gap not only in the stage of PC deployment but also through the entire PC life cycle. Moreover, firms are struggling to provide adequate and timely support for their remote workforce, which may lead to friction between IT and the business in APJ firms.
- › **Workforce productivity across industries in APJ will increase by reducing PC refresh rates.** One of the major factors that will improve the workforce experience will be a reduction in PC refresh rates. With better employee experience, firms will be able to help the workforce with tools they need to get the job done and hence increase corporate productivity. Mature economies such as Japan and South Korea in the APJ region, on the other hand, are at optimal refresh rates and look for more value-added options such as better IT support and remote support for their mobile workforce.
- › **Organizations across APJ look for several attributes in PC life-cycle management technology providers.** In order to effectively manage their PC life cycle, firms will look to partner with technology firms with deep vertical experience, geographical presence, knowledge of regulatory and compliance environments, and the ability to engage with IT and business leaders of the organization.

## Existing Workforce Technology Strategies Do Not Address The Needs Of Employees

Few areas of technology are as fundamental to customer interaction and business execution as the devices and software that employees use. I&O pros are charged with the task of enabling an increasingly mobile workforce with tablets, hybrid laptops, and even wearable technology. Part of their responsibility extends to ensure that the employees are provided with or have access to the devices, apps, and services they need to get the job done. But chances are that workforce technology investments are viewed as a cost and risk center rather than a source of boosting employee productivity, creativity, and flow. IT leaders are not able to link workforce enablement investments to the business goals of the organization.

Mobility, bring-your-own-device (BYOD) programs, and an increasingly diverse and complex ecosystem of devices and apps help I&O leaders facilitate autonomy, productivity, and efficiency of workers. Existing workforce enablement policies don't work for companies striving to

operate in a customer-obsessed operating model where employees depend on technology to win, serve, and retain customers. Why? Organizations designed most existing employee technology policies for a one-size-fits-all model that had a single PC image and mobile device that employees could use for work. In the context of today's workforce, where employees work from multiple locations, use multiple devices, and use their personal devices, it is a business imperative to listen to the workforce technology requirements more closely to deliver the intended results. Some of the key highlights of the study conducted by Forrester are as follows:

- › Employees need better IT support for their endpoint devices.** An increasingly mobile workforce is also increasingly impatient. To meet customer expectations, your employees must be equipped at all times to address customer needs and deliver on their expectations to drive results for your organization. It is no surprise that 67% of business decision-makers would like to reduce the time it takes to resolve IT support issues, while 50% would like to improve employee self-service capabilities. A further 53% of respondents would like to have better remote IT support for the mobile workforce (see Figure 1).

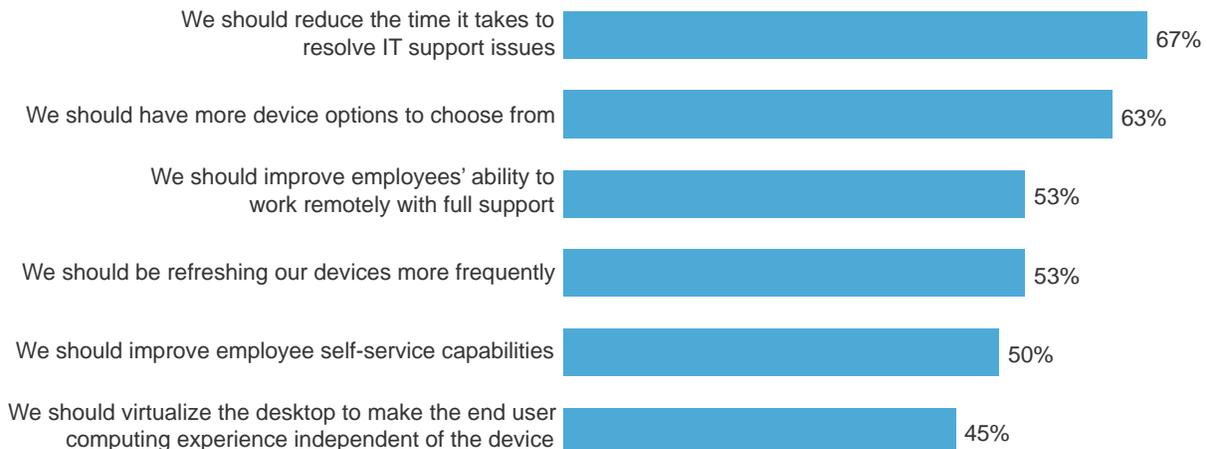
**FIGURE 1**

### Better IT Support (Including Remote Support) And Better Device Options Will Improve The End User Computing Experience Of Your Workforce

**“In order to improve your experience with employee end user computing in your organization, how much do you agree with the following statements?”**

(Select up to three)

(Respondents = business decision-makers)



Base: 107 business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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

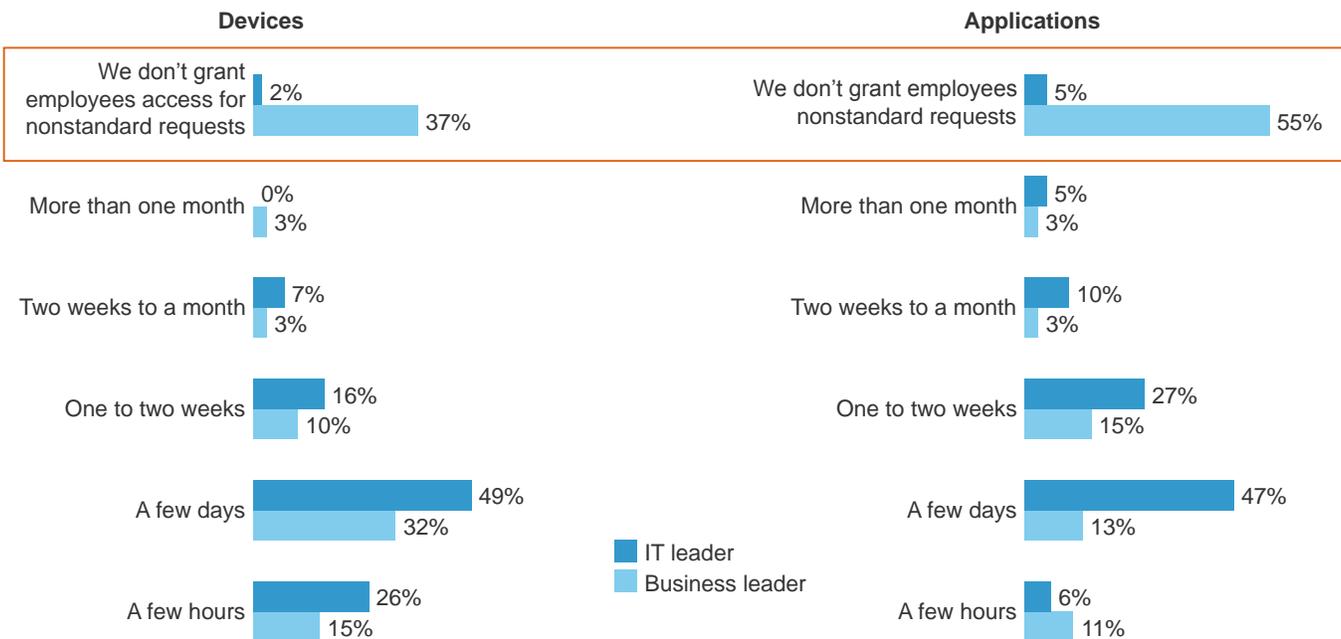
- › **The business needs reduced refresh cycles and more device options to succeed.** Employees are expected to be nimble and, in turn, they expect the tools they use to show a similar degree of flexibility. This fast pace challenges long technology refresh cycles. Our research shows that 63% of the business decision-makers would like to have more device options to choose from. While BYOD provides the much-needed flexibility, the option to choose your own device (CYOD) is more suited to the current needs of business requirements. Further, more than half (53%) of the respondents want to reduce their current refresh cycle to improve their experience with end user computing and deliver on the tasks entrusted upon them (see Figure 1).
- › **The business feels restricted on nonstandard device and applications requests.** There is a conflict between the view of the IT and business organizations when it

comes to addressing nonstandard device and application requests across organizations in APJ. An overwhelming 37% of business decision-makers said that they do not get approvals for nonstandard device requests, while 55% of business respondents said the same for nonstandard application requests. Additionally, the perception of time taken on delivery of nonstandard requests is much more for the business as opposed to the IT organizations in APJ (see Figure 2).

- › **Better user experience and employee preference will drive the demand for new devices.** New device demand will stem from employee needs. The workforce places better user experience (56%) as the top choice for driving demand, while employee preferences of device features such as higher processing speed and better battery life (50%) is the second most preferred choice (see Figure 3).

**FIGURE 2**  
**The Friction Between The IT And Business Organizations For Nonstandard Device And Application Requests Is Palpable**

“If an employee asks to use a different type of device or an application that’s not already a part of your company’s approved device or application list, how long do you estimate it would take for the request to be fulfilled?”



Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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

- › **Though security concerns may not force buying behavior, they are an important consideration for PC life-cycle management.** Security was chosen by only 30% of respondents as one of the top three factors driving the demand of new devices for employees in the organization. On the other hand, 71% of respondents indicated device malware is a key device security issue.
- › **Reliability of devices has a broad meaning in APJ.** Reliability is the choice least preferred by our survey respondents to drive the demand of new device

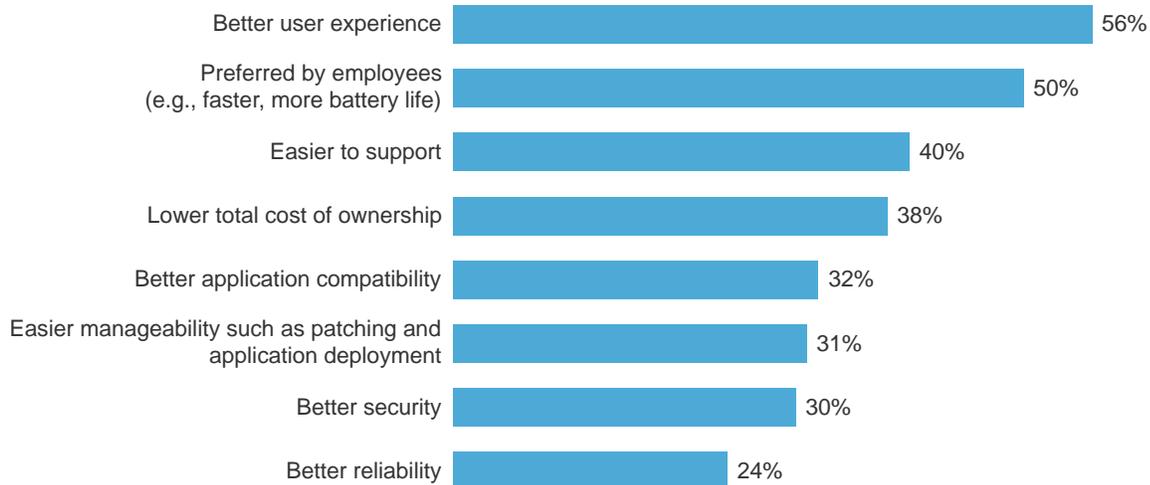
technology in the organization. Only 24% of the respondents chose reliability as a top three factor for generating demand for devices (see Figure 3). Part of the reason is that reliability is not well understood in the APJ region. When we asked business and IT leaders what factors influenced reliability of a device, respondents chose options within a narrow frequency range, from uptime of the device (58%) to speed and ease of repair (66%). Performance (65%), battery life (63%), and durability (60%) fell in between.

**FIGURE 3**

**New Device Technology Will Provide A Better User Experience And Better Cater To Employee Preferences**

**“Which of the following are driving the demand of new device technology in your organization?”**

(Choose your top three)



Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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

## PC Life-Cycle Management Complexities Are Overwhelming For Organizations In APJ

Many workers use the latest devices — and often several devices — to stay connected with the needs of the business, as technology provides more capabilities and access to corporate data. This means that employees expect I&O pros to support all of their devices with the same level of service and ensure that new capabilities are available on all devices. IT leaders will strive to find solutions to these challenges within the budgetary constraints they have.

Technology diversity also brings in device life-cycle management challenges. More specifically for PC life-cycle management, organizations across APJ indicated that cost is the top challenge they face (62% of respondents), as well as increasing budget pressures (40%). The other challenges arise from the complexity of managing a diverse set of vendor relationships (43%) and the diversity

of existing devices in the employee technology environment (33%) (see Figure 4). The need for an overhaul in PC life-cycle management strategy is borne out in the responses to our survey:

- › **Providing efficient IT support for the PC life cycle has been a hurdle.** Firms will realize that PC life-cycle management requires specialized tools and skills to be effective. The challenges multiply when we factor in ongoing support (25%) during various stages of the PC life cycle and support for the remote workforce (37%) (see Figure 4).
- › **Nearly half of the respondents manage several vendors.** The added complexity of managing several vendors for the PC life cycle leads to suboptimal results. It is often difficult to customize to the requirements of an individual employee. Forty-nine percent of respondents to our survey said that firms across APJ have to source their PCs from a large number of vendors or resellers for PC life-cycle management (see Figure 4), while 54% of respondents said that the PC life-cycle processes are managed for them by a vendor (see Figure 5).

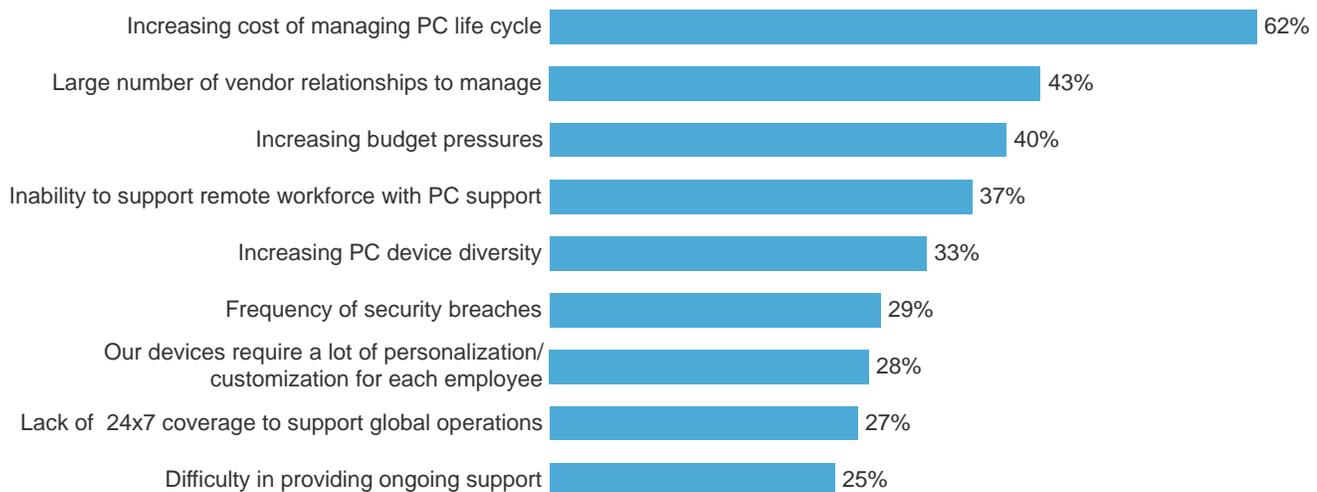
**FIGURE 4**

### Costs And Managing Complex Vendor Relationships Are The Biggest 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: 220 IT decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

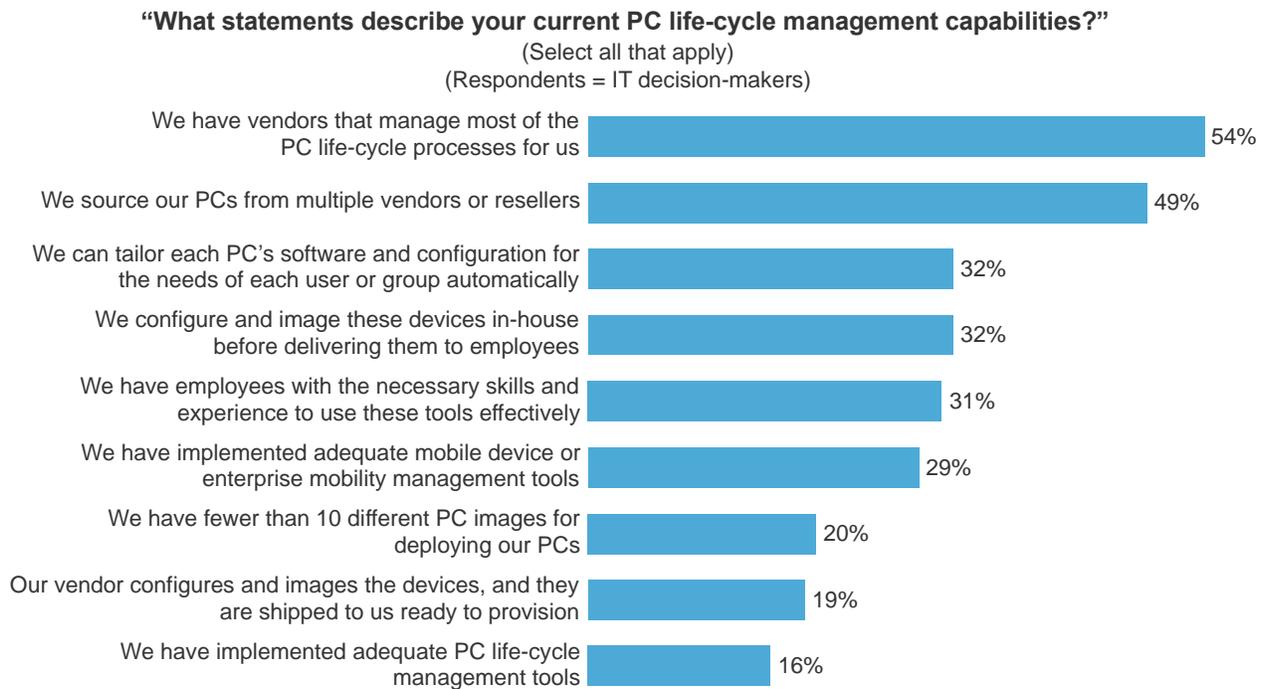
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

› **Current methods of managing the PC life cycle are inefficient.** Only 16% of the survey respondents said that they have implemented PC life-cycle management tools. In turn, 84% of APJ organizations do not have an adequate view of employee device needs during the life cycle of the device with the employee. Furthermore, 80% of the respondents have more than 10 different PC images for PC deployment, indicating inefficiency in life-cycle management (see Figure 5).

**Firms lack the in-house skills for PC life-cycle management.** Due to the lack of adequate in-house skills available within the organization, only 32% of respondents said that they are in a position to customize each PC's software and configuration to the needs of an individual or a group, while 31% said that their employees have the necessary skills and experience to use the PC life-cycle management tools properly (see Figure 5).

**FIGURE 5**

**Firms Do Not Have Adequate In-House Skills For PC Life-Cycle Management Across Organizations In APJ**



Base: 220 IT decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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

## Firms Do Not Have Adequate In-House Capabilities To Effectively Manage The Workforce PC Life Cycle

Technology adoption among today's workers is changing dramatically. The denizens of this new world are empowered digital natives, brazenly challenging business conventions for where and how work gets done, and challenging IT to find new ways to deliver support, security, and freedom around the clock for work-related activities. That change, combined with new cloud and virtualization technology, will drive a shift in the way companies think about delivering and managing PCs, applications, and devices for their workforce.

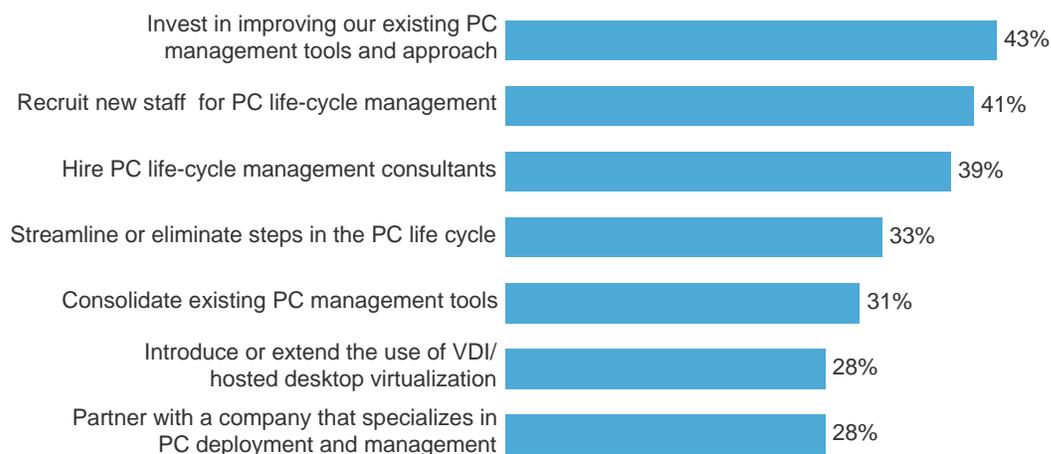
IT organizations have to find a fine balance between managing budgetary constraints, delivering efficient IT support for the entire PC life cycle, and enabling enhanced productivity and workforce experience. It is evident that firms in APJ do not have adequate in-house skills. They end up managing far too many PC life-cycle management vendors, which further drives up costs as firms struggle to manage complex relationships. PC life-cycle management strategy will evolve:

- › **Firms will adopt better tools to manage the PC life cycle.** Forty-three percent of our survey respondents from APJ said that they will look to invest in improving PC management tools and approaches, while 31% of respondents will consolidate existing PC management tools to consolidate their workforce technology approach (see Figure 6).
- › **Firms will look to bridge the existing skills gap.** Some of the firms in APJ will augment their existing in-house capability by recruiting new staff for PC life-cycle management (41%), while 39% of the respondents will outsource the same work to PC life-cycle management consultants (see Figure 6).
- › **Firms will move functions of PC life-cycle processes to technology service providers.** By getting rid of these noncore activities, IT staff will be able to focus on delivering real value that employees need. Forrester believes that firms will look to outsource some of the functions in PC life-cycle management processes to technology service providers in order to free their in-house resources for core business operations.

**FIGURE 6**

**Firms In APJ Will Look To Invest In PC Life-Cycle Management Tools And Bridge Existing Skill Gaps To Address PC Life-Cycle Challenges**

**“Which of the following are you considering to solve the challenges you face with your PC life-cycle management approach today?”**  
(Select all that apply)



Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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

The current situation provides an opportunity to organizations as well as technology service providers to evolve their PC life-cycle management strategy by outsourcing several key components to technology providers. In order to do so, firms across APJ are looking at several key attributes in a technology provider:

› **Ability to work across organizational diversity.** Thirty-five percent of organizations look for technology providers that can support operations across geo-spreads, while 26% vie for global delivery capability. Further, with dynamic regulatory and compliance environments, 30% of the respondents are looking for support in their ability to improve compliance with regulations (see Figure 7).

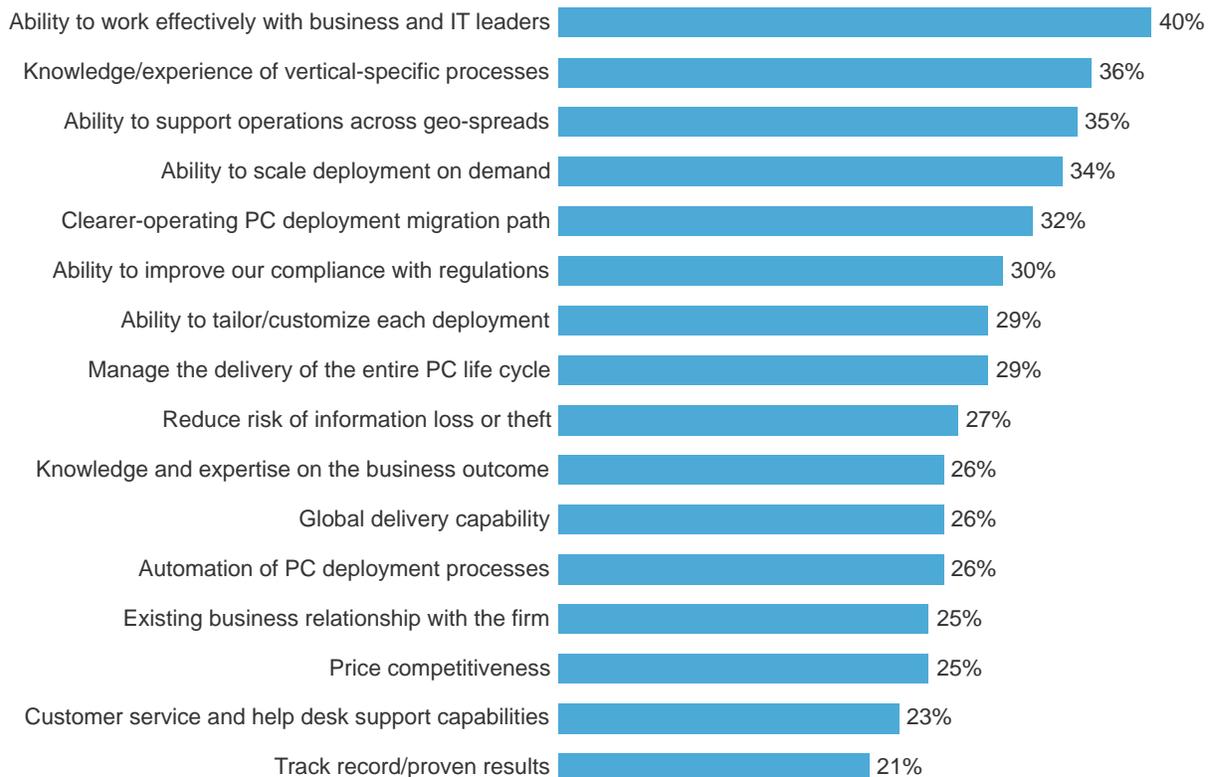
› **Deep experience, flexibility, and leadership capabilities are highly sought after.** Forty percent of the respondents chose the ability to work effectively with business and IT leaders as the top attribute they look for in a technology partner. Deep vertical experience (36%) that can enable the service providers to understand the internal business processes better and help the organization to get customized solutions suited to their own requirements (29%) are the other top attributes that APJ organizations look for in a technology service provider (see Figure 7).

**FIGURE 7**

**Firms Look For Various Diverse Attributes For A Successful Technology Partnership In PC Life-Cycle Management**

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

(Select up to five)



Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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

## Key Recommendations

Forrester recommends that I&O professionals make these key process changes as part of their workforce transformation:

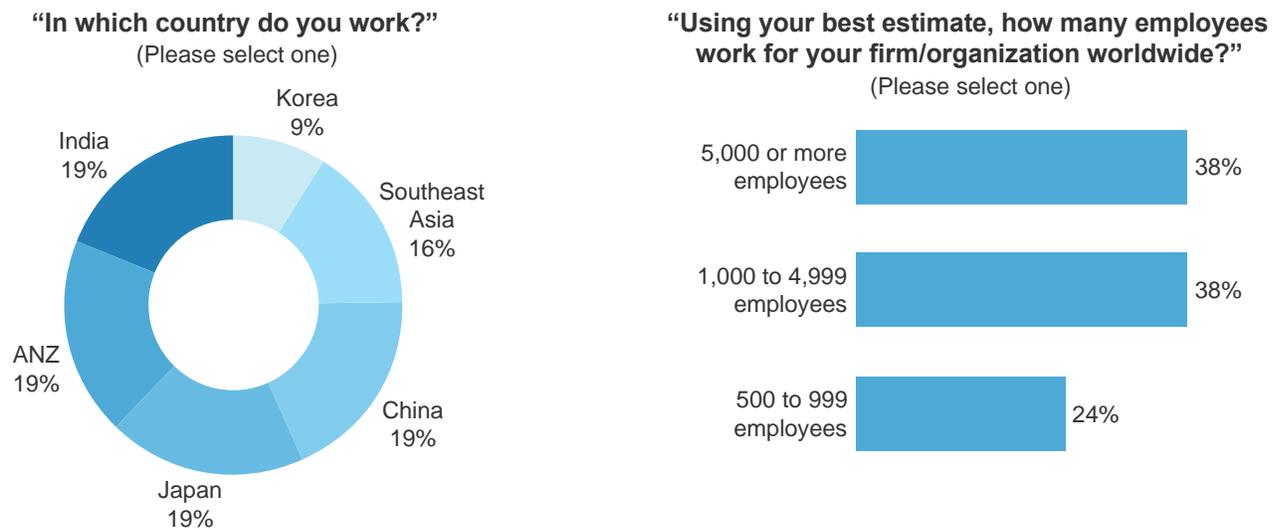
- › **Allocate budget to technologies that win, serve, and retain customers.** Too much of the technology you give to your employees isn't necessary — or worse, leaves employees without the tools they need to do their best work. A one-size-fits-all approach means overprovisioning some employees with 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. Your operational teams should be able to work with your marketers and other business leaders on technology strategies to support their customer engagement efforts.
- › **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. Just as cloud is a way to take advantage of the economies of skill and scale of an outside organization, the same is true for your support operations. Does it make sense for your staff to learn about every new device and OS from Apple, Google, Microsoft, or Samsung? Or is this better served by external support channels like the Apple Genius Bar, Microsoft Answer Desk, or Best Buy Geek Squad? "Virtualize" certain processes to take advantage of outside resources to help you support your users when technology breaks.
- › **Industrialize the device life cycle with more intelligent automation.** Can you automate the life cycle of the PC? Absolutely. Should you? It's a must. Unfortunately, few firms invest in automation beyond the basics. The automation level for most firms stops at weekly patch cycles, software packaging, and deployment, but going a step further to build more intelligence into life-cycle process automation can transform agility. For example, a global airline automates the PC provisioning process dynamically. Regardless of a new PC's location, role, or manufacturer, it automatically receives the correct image, software, and settings profile within moments of first power-up anywhere on the network.

## 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, 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.

## Appendix B: Supplementary Graphs And Demographics

**FIGURE 8**  
Demographics: Company Type — Location And Organization Size

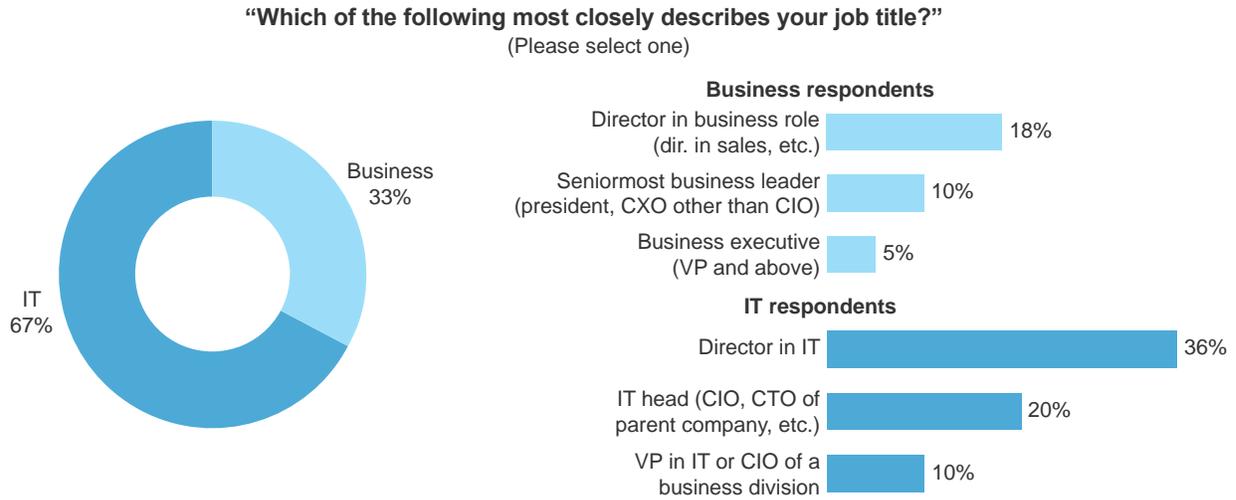


Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

(percentages may not total 100 because of rounding)

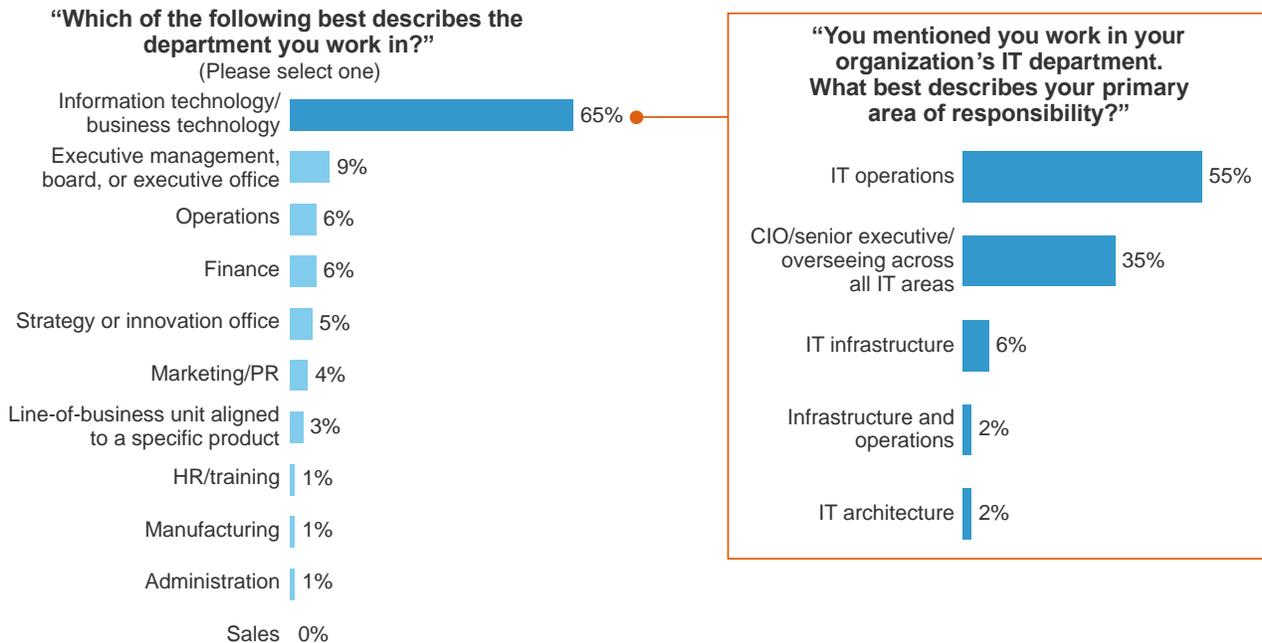
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

**FIGURE 9**  
Demographics: Position In Organization



Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

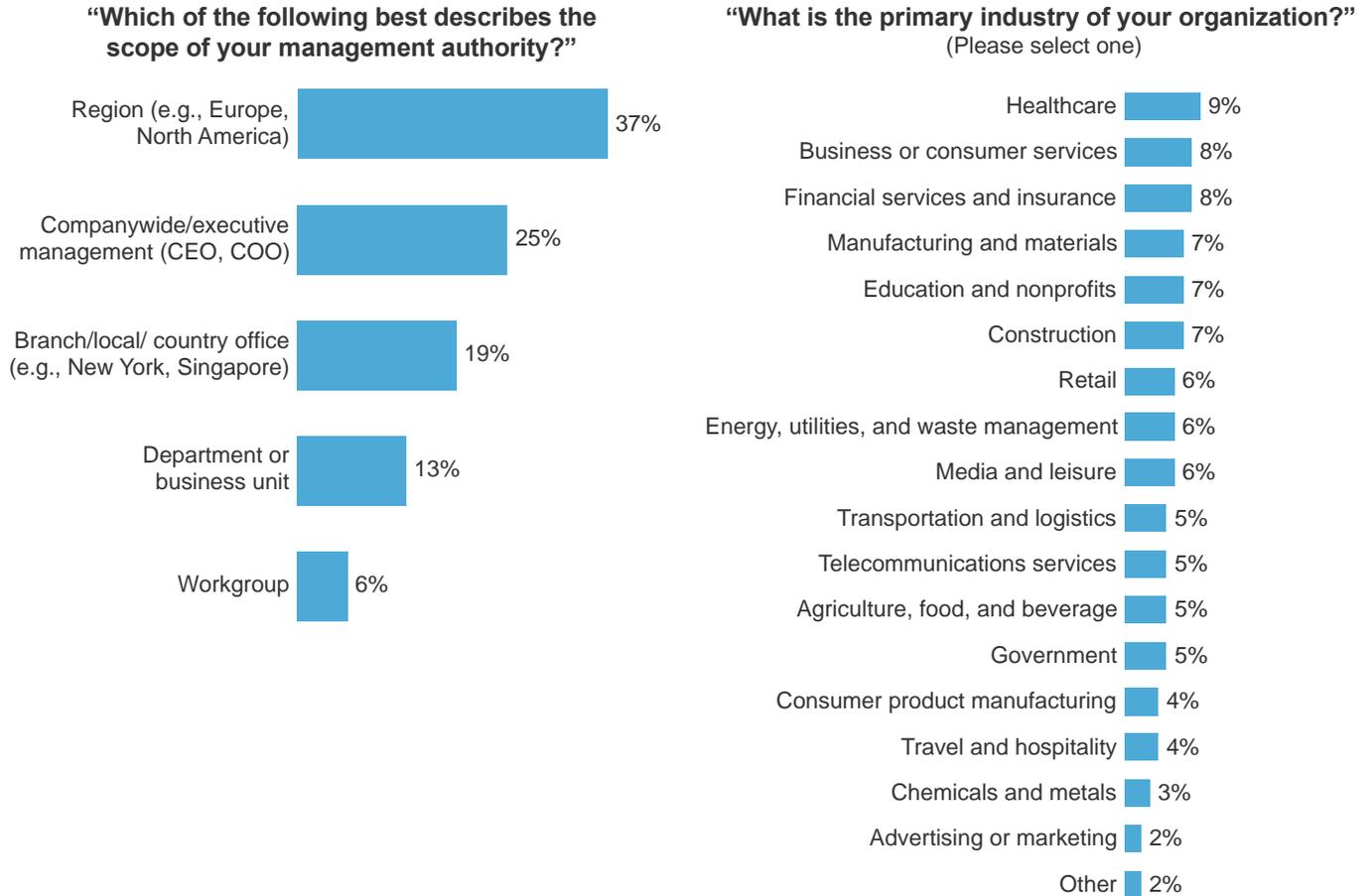
**FIGURE 10**  
Demographics: Department



• The majority of decision-makers identify themselves with the IT/technology department.

Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)  
(percentages may not total 100 because of rounding)  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, August 2016

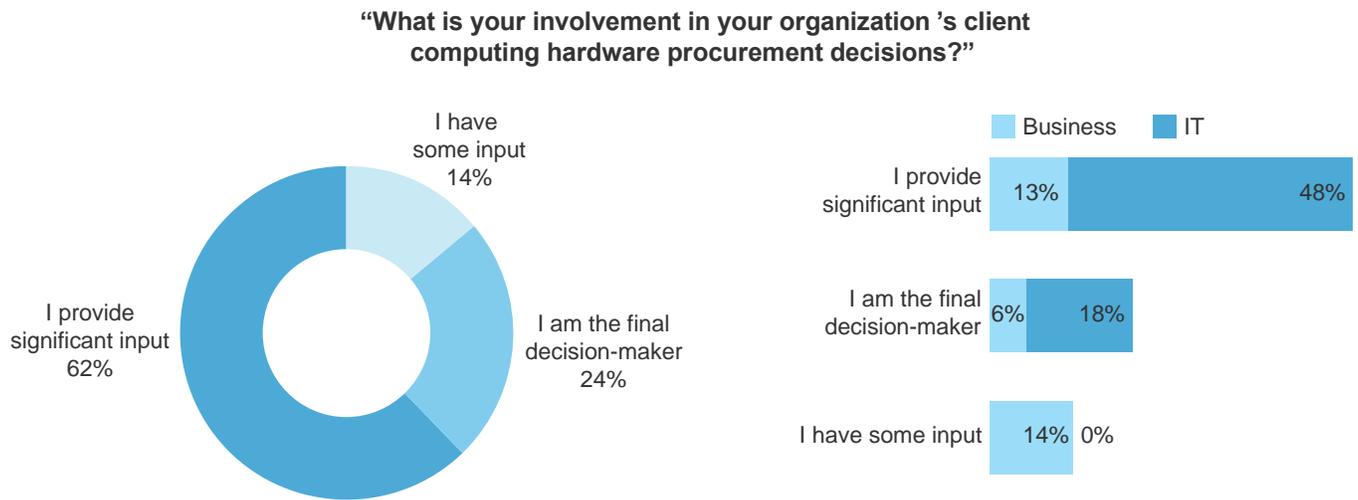
**FIGURE 11**  
**Demographics: Industry And Management Authority**



Base: 327 IT and business decision makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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

**FIGURE 12**  
**Demographics: Hardware Procurement Role**



Base: 327 IT and business decision-makers across organizations in China, India, Japan, SEA (Singapore, Malaysia, Indonesia, and the Philippines), South Korea, and ANZ (Australia, New Zealand)

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