

“Work from anywhere”

How CIOs are empowering the future of work



Introduction

The role of Chief Information Officer (CIO) has developed over the years. It has transformed from being the head of the IT department to being a key strategic role within the organization. This is due, in part, to how critical technology is to the everyday running of any successful business. CIOs are crucial to the development of technology within organizations. The digital transformation initiatives led by CIOs and their teams are instrumental to organizations running efficiently.

And with the recent digital transformation acceleration, CIOs are now working even harder to take organizations to new levels of digital flexibility. As organizations around the globe look to transition towards a “work from anywhere” ethos, they do so with technology at their core. The “work from anywhere” model (also known as “remote-first” or “digital-first”) is defined as when organizations shift their working practices to treat remote and location-based employees the same, regardless of where they work. It offers employees the opportunity to seamlessly work from any location, as if they were in the traditional office environment.

- » This model offers tremendous benefits for any organization and affords the workforce a huge degree of flexibility. For “work from anywhere” to work successfully, CIOs and their teams must deliver the same fluid user experience that the workforce has come to expect in the office environment, but

from wherever the end-user decides to work. This way of working has become commonplace in many organizations and it’s now down to the CIO and their teams to continue to deliver this continuous experience for end-users. They must put in place strategies and technologies which will make this once temporary situation, a permanent reality.

If organizations can implement their “work from anywhere” strategies successfully, they can reap the benefits of being able to recruit from anywhere around the world and reduce staff turnover. By not confronting this matter soon, organizations risk losing their top talent to organizations that do embrace this working model. “Work from anywhere” has eliminated the majority of geographical barriers that the workforce once faced when applying for jobs. Employees now have a much wider pool of businesses to choose from when looking for their next role. Equally, employers also have more recruiting options.

- » In order for organizations to retain their top talent and truly embrace the “work from anywhere” ethos, CIOs and their teams must enable their workforce to “work from anywhere” by adopting the right technologies and processes.

This paper, based on independent research commissioned by Dell Technologies, Intel and VMware, looks to explore what hybrid working means to CIOs from around the globe and how they feel about this monumental shift towards a hybrid working environment.

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Key Findings

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17% of CIOs report that their organization has already implemented and are fully using a hybrid working model

50% of CIOs are worried about providing proactive and remote IT support when supporting a “remote-first” approach

48% of CIOs believe their organization requires help with keeping remote workers secure

87% of CIOs agree that all organizations should be adopting a “remote-first” ethos

55% of CIOs currently spend half or more of their time working remotely, while 64% would like to work that way in an ideal world

56% of CIOs who currently work to a hybrid model report increases in employee satisfaction and wellbeing as a benefit of working to that model

99% of CIOs report that their organization has invested in technology over the last 12 months

24% of CIOs from organizations with 3,000 – 4,999 employees have already adopted a “remote-first” model

Defining and adopting hybrid working

As the final decision-maker when it comes to digital transformation, CIOs around the world have experienced first-hand how the acceleration of digital transformation has been the catalyst for many organizations when it comes to shifting their workforce to a “work from anywhere” mentality. While this shift might have caught many organizations by surprise, the great work that the CIOs and their teams have achieved within digital transformation has allowed organizations to adopt “work from anywhere” quickly.

Supported by technology, the “work from anywhere” model, often referred to as “hybrid working”, means something different to each surveyed CIO.

Defining hybrid working/learning in their own words



Figure 1: In your own words, how would you define 'hybrid working' / 'hybrid learning'? [950]

It's clear that CIOs need to tailor their hybrid working approach to their organization's needs. This is further cemented when looking at which definition best fits their understanding of hybrid working.

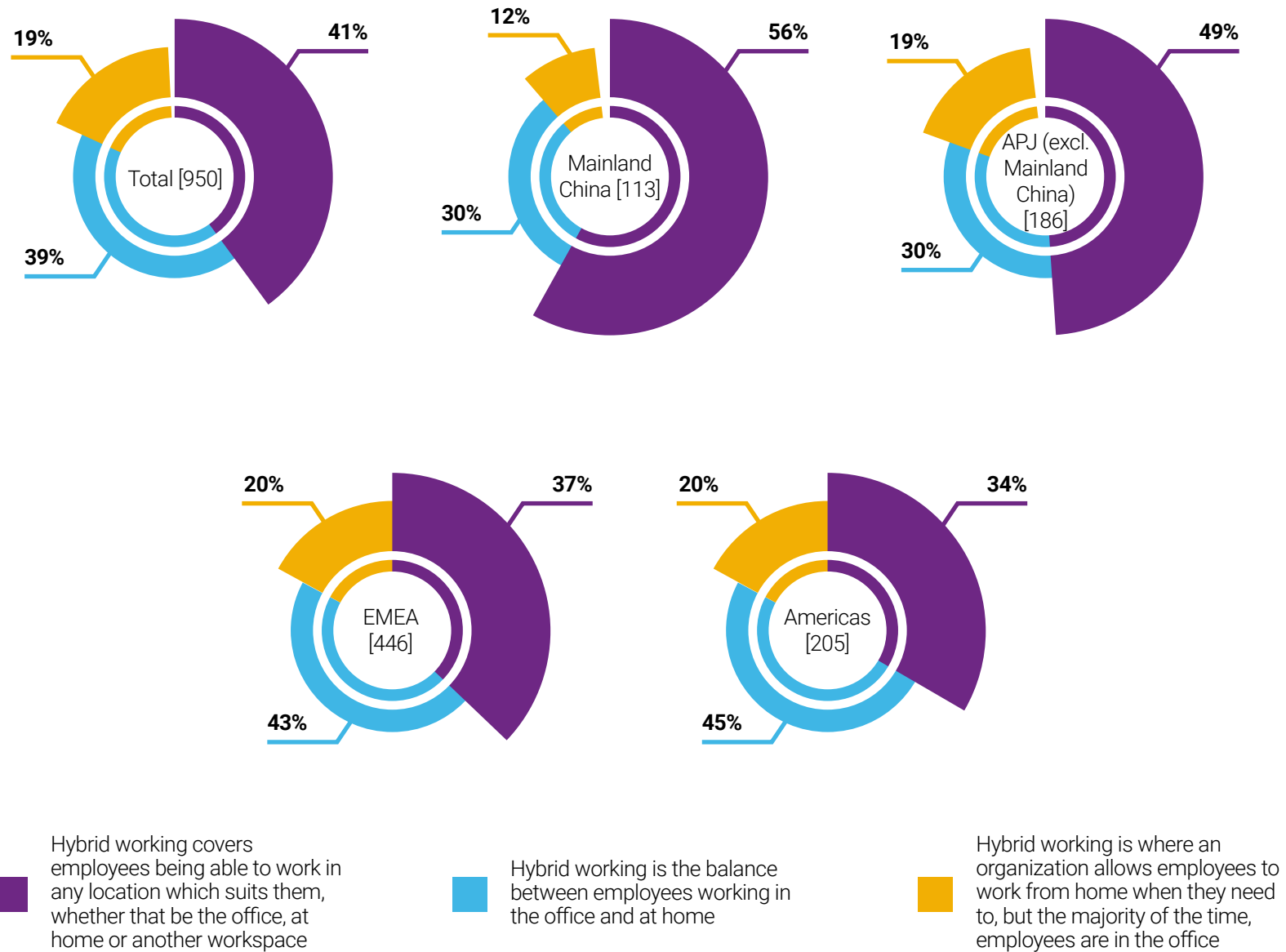


Figure 2: Which of the following definitions do you think most closely aligns with your understanding of the term hybrid working?
[Base in chart] split by region

These differences in definition are also noted when looking across different sectors and sizes of organizations. As organizations grow in size, CIOs report that they are more likely to identify with the more flexible way of working.

“Hybrid working covers employees being able to work in any location which suits them, whether that be the office, at home or another workspace”

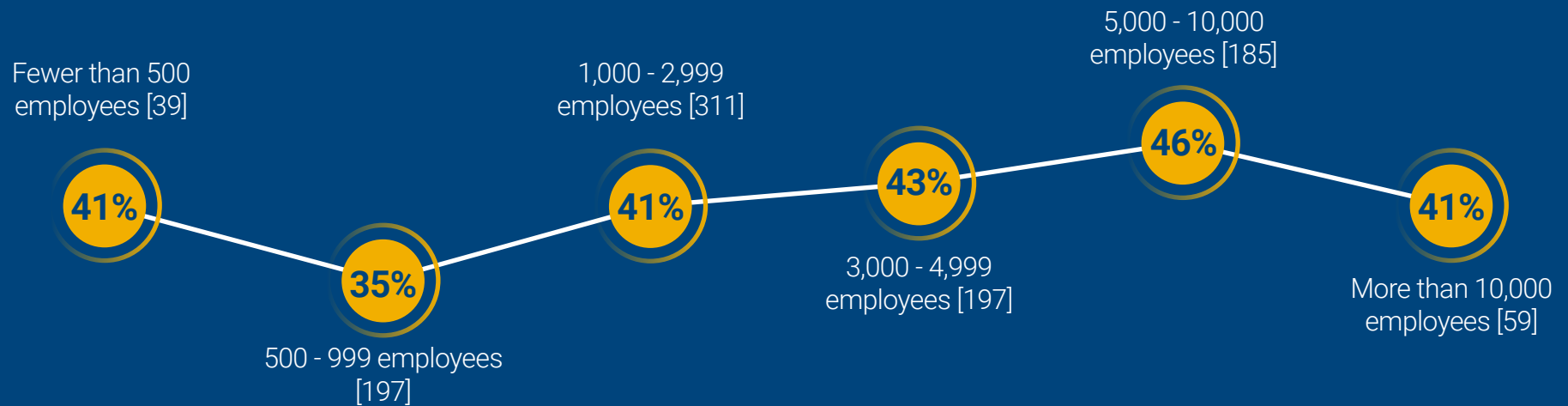


Figure 3: Percentage of respondents who report that the above definition most closely aligns with their understanding of the term hybrid working?
[Base in chart] split by global organization size

Regardless of the definition which best suits their business, it is critical that organizations and CIOs act now in order to meet this spectrum of expectations. And based on their adoption rates, this is an area that they are working on.

Organizations' adoption of a hybrid working model

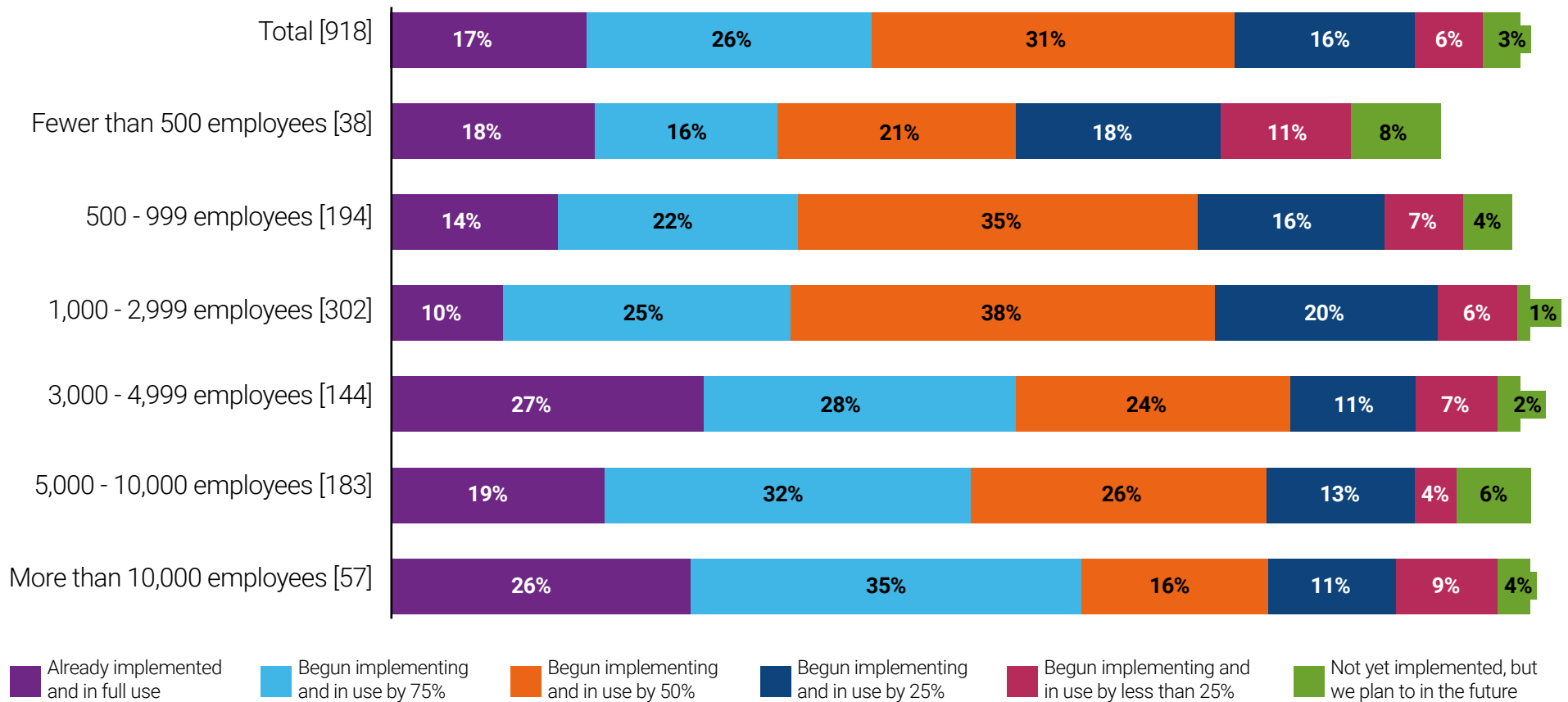


Figure 4: As it stands today, to what extent has your organization adopted or plans to adopt a hybrid working model? [Base in chart] organizations who have at least some of their employees working both in the office and remotely, split by global organization size

Adoption is varied among the different sized organizations, but the message is clear: this is an area CIOs are looking to engage in. Adoption of this model is also mixed among different sectors, with CIOs from higher education (28%) and retail and consumer products (25%) being the most likely to report that their organization has already implemented and is fully using the hybrid working model.

As CIOs look to drive their organization towards the version of hybrid working that works best for them, they must keep in mind that there are some areas where they need help, in order to transition successfully.

Which areas do organizations need help with in order to transition to a hybrid working environment?

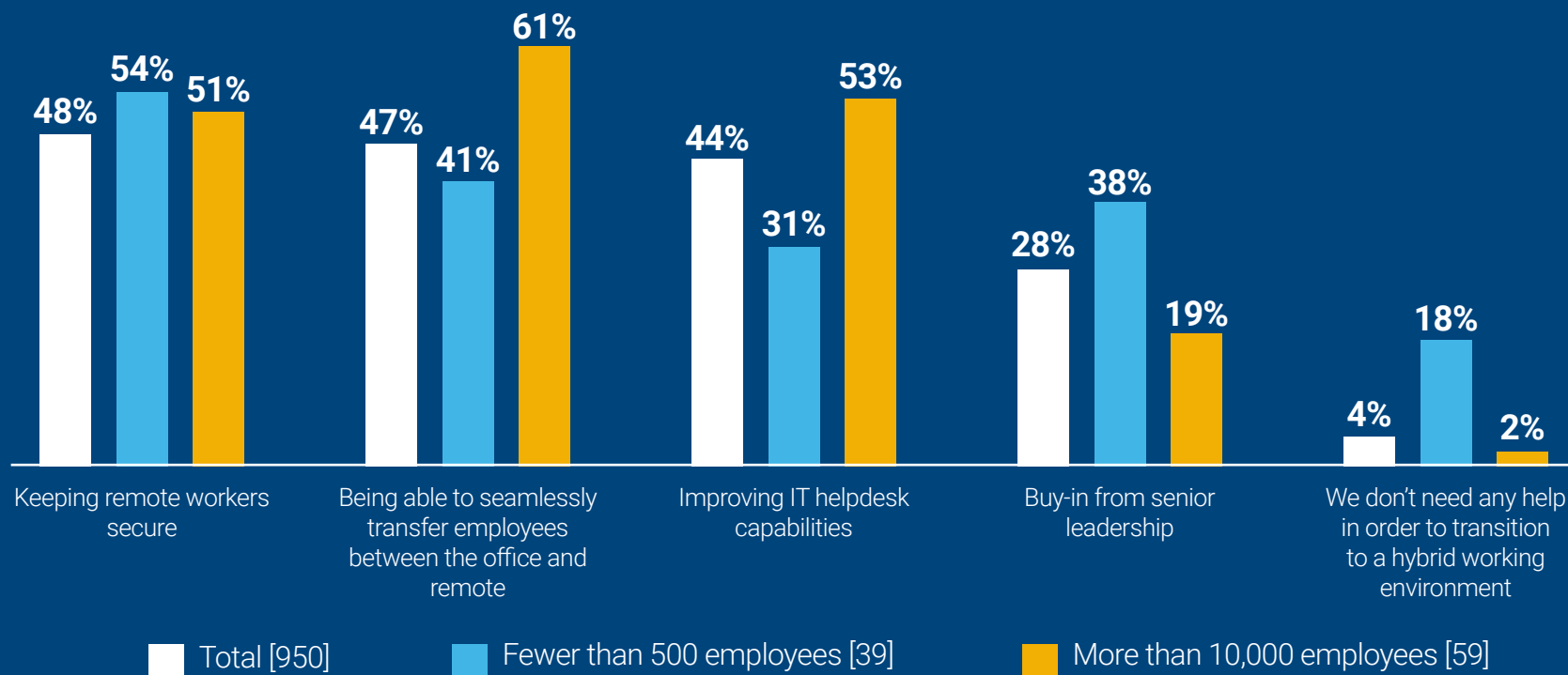


Figure 5: Which of the following areas, if any, does/do you think your organization needs help with, in order to transition to a hybrid working environment? [950] split by global organization size, only showing the largest and smallest organization sizes

These challenges vary depending on the size of organization. The CIOs from the largest sized organizations (more than 10,000 employees) are the most likely to report that they require help with seamlessly transferring employees between the office and remote (61% versus 47% global CIO average) and improving IT helpdesk capabilities (53% versus 44% global CIO average).

Those from the smallest size organizations (fewer than 500 employees) are the least likely (82% versus 95% global CIO average) to report they need help in order to transition to a hybrid working environment. However, they are the most likely

of all the organizations to say they need help with keeping remote workers secure (54% versus 48% global CIO average) and getting buy-in from senior leadership (38% versus 28% global CIO average).

It's clear that the size of organization plays a huge part in how the "work from anywhere" model is shaped and the challenges CIOs face in order to transition to this way of working. The "work from anywhere" approach will become a permanent fixture in most, if not all, company cultures so it is imperative for CIOs to invest time into the model now, in order to enable their organization to continue to work at its best into the future.

Hybrid working - the personal angle

Having the freedom to work in a way which suits them is something that many CIOs are interested in.

How CIOs wish to split their time between the office and remote working

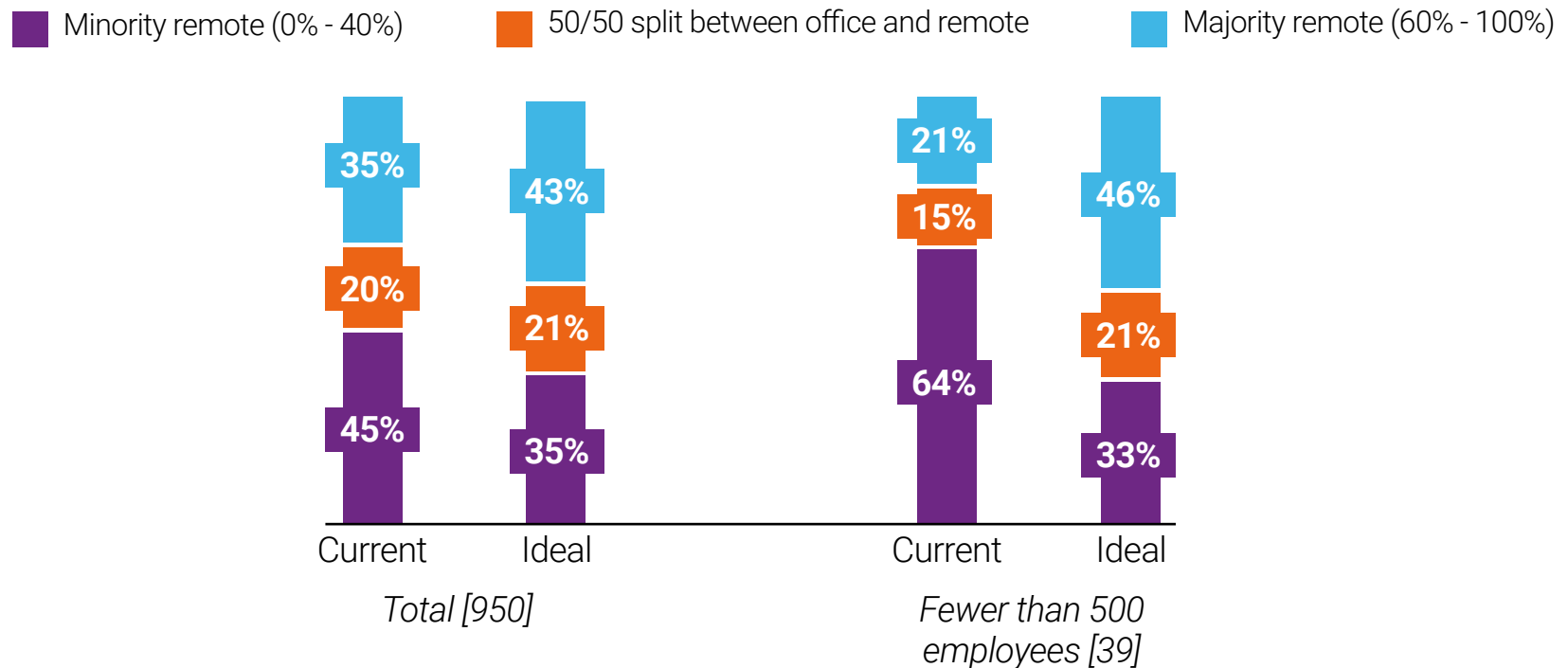


Figure 6: How do you currently split your time between the office and remote working and what would this split look like in an ideal world? [Base sizes in chart] split by global organization size, only showing those from organizations with fewer than 500 employees

The disparity between current and ideal expectations is much more pronounced for CIOs from organizations with fewer than 500 employees. This group are one of the least likely to report that their organization has implemented a hybrid working model. They are also the least likely to identify with the more flexible hybrid working definition.

While CIOs from these organizations are eager to spend more time working remotely, there are obstacles blocking them from being able to do so. Overcoming these challenges will be key for these CIOs, as by not doing so, they could risk losing their top talent to firms that do.

What is likely driving this desire to spend more time working remotely are the worries that CIOs have about returning to a physical working location.

Personal worries for CIOs when thinking about going back to a physical working location



Figure 7: Which of the following worries you personally about the idea of going back to a physical working location?
[Base sizes in chart] split by global organization size, only showing those from organizations with fewer than 500 employees

Worries are centred around remaining safe and the time and money spent on travel. CIOs from smaller organizations (fewer than 500 employees) are the most likely to report that these areas are concerns for them, as well as the negative impacts returning to the physical office will have on their health and wellbeing.

These worries also vary greatly when comparing CIOs from around the globe, with each region reporting slightly different worries.

Personal worries for CIOs when thinking about going back to a physical working location

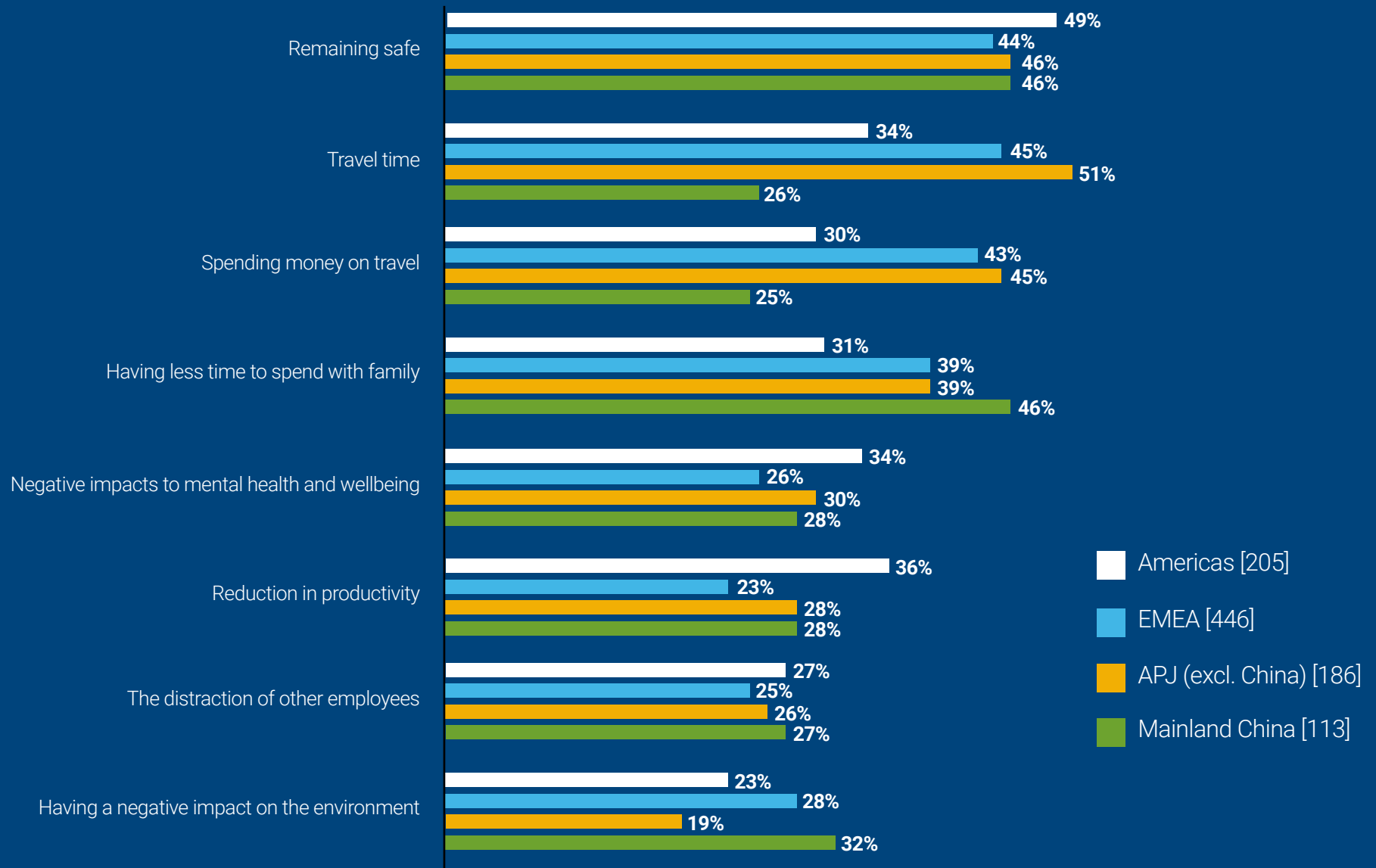


Figure 8: Which of the following worries you personally about the idea of going back to a physical working location? [Base sizes in chart] split by region

Biggest benefits to respondents personally when working remotely:

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I have more time to incorporate physical exercise and take care of myself while still being productive at work.

CIO in life sciences

I do not have to waste time and money on the commute to my office meaning I will have more disposable income and more importantly time to do thing I enjoy.

CIO in higher education

I feel that I can take advantage of the travel time to advance more in the projects and have more time to be with my family. I am more productive.

CIO in manufacturing

Cost savings, better wellbeing and improved mental and physical health. I would not want to go back to full time in the office, otherwise I might have to change jobs.

CIO in consulting

It's becoming even more evident that the "work from anywhere" approach and how CIOs and organizations implement it needs to be flexible, in order to meet the differing needs of the workforce. These needs not only change by organization size, but also by location and even sector. As CIOs map out the best solution for their companies, they do so with the knowledge that working in this way has massive benefits for them personally.

Figure 9: What is/do you think would be the biggest benefit to you personally when working remotely? [950]

Empowering the workforce through technology

The role of the CIO is grounded in technology. It is the cornerstone of organizations and drives all initiatives and strategies that CIOs look to develop. With the advent of the “work from anywhere” ethos, technologies’ place in the organization has become even more critical and will continue to be important as organizations look to further their “work from anywhere” journey.

With this in mind, it is not surprising that 99% of the surveyed CIOs report that their organization has invested in technology over the last year. On a global level, 59% of CIOs report their organization is investing in the cloud. The flexibility of the cloud allows organizations to support the remote workforce and scale resources when needed.

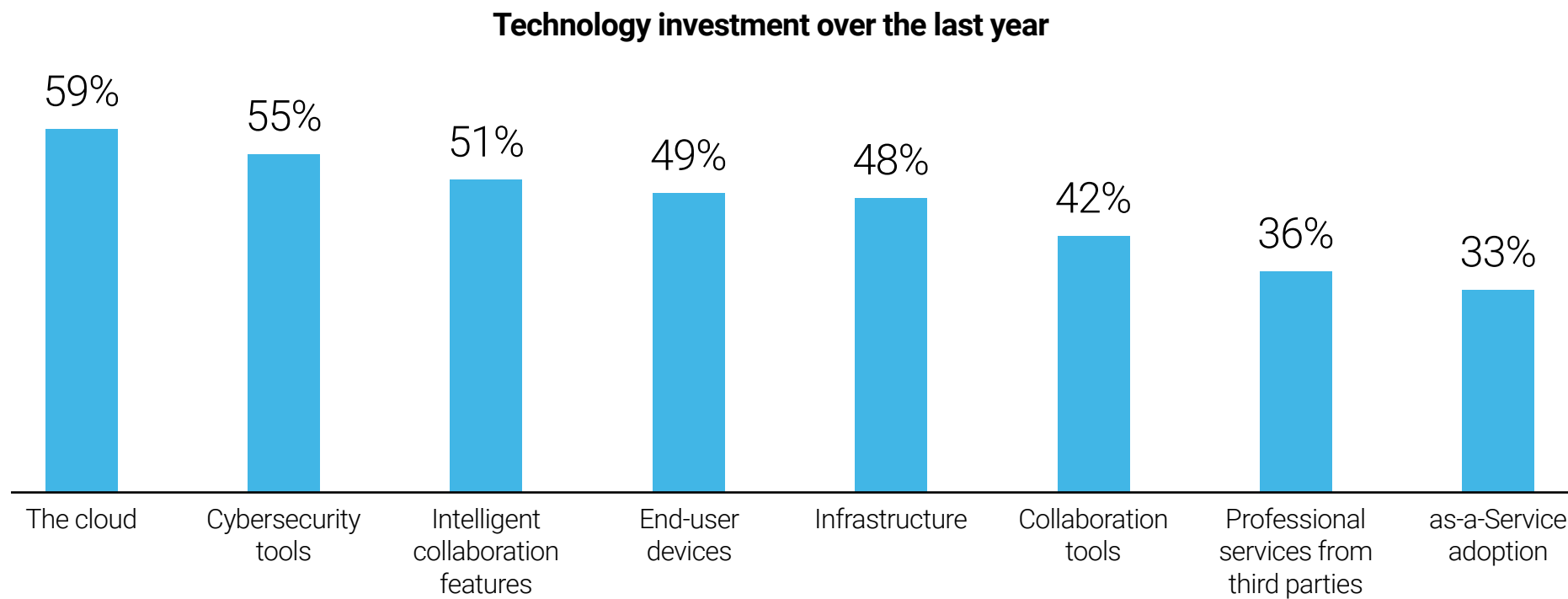


Figure 10: Which of the following technologies, if any, has your organization invested more in over the last year? [950]

However, when we look at technology investment split by the different sized organizations, we see that for those with fewer than 500 employees, their most likely area of investment is end-user devices. This group is one of the furthest behind when it comes to hybrid working adoption and it's likely that in order to fuel their journey towards the "work from anywhere" model, they needed to invest heavily in hardware like end-user devices.

On a regional level, the cloud is the most likely technology that all regions are investing in. However, CIOs from Mainland China are also reporting that their organizations are equally investing in intelligent collaboration features, like improved audio settings, network connectivity and enhanced video conferencing. As they are the most likely region to identify with the more flexible hybrid working definition (as seen in figure 2), it's clear that for them, supporting this flexible approach has meant investment in this area.

As we look to the future, cloud continues to dominate as the main technology that CIOs foresee their organizations investing more in over the next year, in order to support a hybrid working environment/remote working.

Technology investment over the next year in order to support a hybrid working environment/remote working

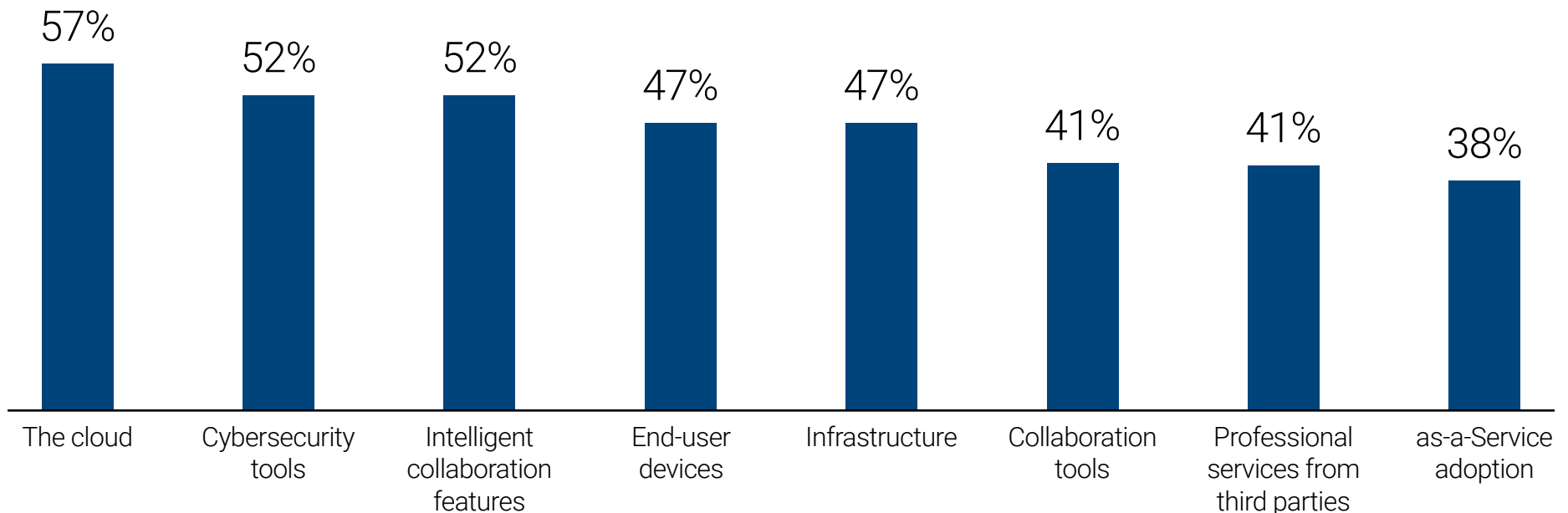


Figure 11: Which of the following technologies, if any, will your organization invest more in over the next 12 months in order to support a hybrid working environment/remote working?
[904] organizations who have some or all of their employees working remotely

Investment in the cloud is also a priority for organizations with between 500 – 4,999 employees and those with more than 10,000 employees. However, CIOs from organizations with fewer than 500 employees and those with between 5,000 and 10,000 employees have slightly different investment strategies in mind.

Top 2 most likely technologies organizations intend to invest more in to support a hybrid working environment/remote working

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Organizations with fewer than 500 employees [37]



51%

End-user devices



49%

The cloud

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Organizations with 5,000 - 10,000 employees [181]



56%

Intelligent collaboration features



53%

The cloud

14

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Figure 12: Which of the following technologies, if any, will your organization invest more in over the next 12 months in order to support a hybrid working environment/remote working? [Base sizes in chart] organizations who have some or all of their employees working remotely

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Smaller organizations are clearly still working towards being able to support a “work from anywhere” model, with a continued investment in end-user devices allowing them to really embody the more flexible working from anywhere ethos.

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CIOs from larger organizations are focusing their technology investment over the next 12 months on intelligent collaboration features. As they work towards their “work from anywhere” model, they do so with perhaps different challenges to those from smaller organizations. It worth bearing in mind that intelligent collaboration features can benefit both remote and office workers. They can be deployed within meeting rooms and collaborative spaces, in order to also prepare the office for this new way of working.

As some CIOs look to support the return of some of their staff to a physical office location, making these preparations as soon as possible will be key to ensuring that employees can seamlessly transfer between the office and remote environments - an area which is a challenge for around half of the respondents (as seen in figure 5) – and ensure that all members of the workforce can embrace the “work from anywhere” model.

The “work from anywhere” model

A “work from anywhere” approach ensures that irrespective of their working location, employees have equal opportunities and access to the applications and data they need to do their job. It doesn’t matter where you are in the world, the technology used affords employees the opportunity to “work from anywhere”.

The vast majority (87%) of CIOs agree that all organizations should be adopting this kind of model. Agreement among the different sized organizations is varied, however, those from the smallest organizations (fewer than 500 employees) are the least likely (64%) to agree. Considering that this size of organization is further behind on its “work from anywhere” journey, it’s perhaps not a surprise to see this.

Adopting a “remote-first” ethos

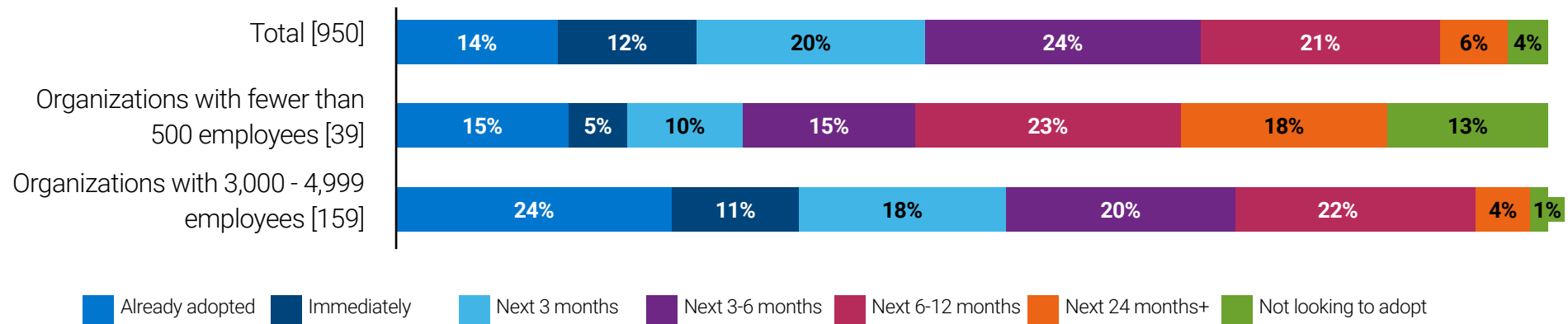


Figure 13: How quickly do you feel your organization could adopt a ‘remote-first’ mindset? [Base sizes in chart] split by global organization size, only showing those from organizations with fewer than 500 employees and those with 3,000 - 4,999 employees

To cement this viewpoint in further, CIOs from organizations with fewer than 500 employees are the most likely to say that their organization is not looking to adopt a “remote-first” ethos.

In contrast to this, those from organizations with between 3,000 and 4,999 employees are the most likely to have already adopted the “work from anywhere” approach. From a regional perspective, CIOs from organizations based in the Americas are the most

likely (20%) to have already adopted this mentality versus their counterparts in EMEA (11%), APJ (12%) and Mainland China (18%).

It’s clear that the challenges which come with supporting this approach could be impacting how quickly organizations are adopting it.

Top 4 worries for CIOs when thinking about supporting a “remote-first” model

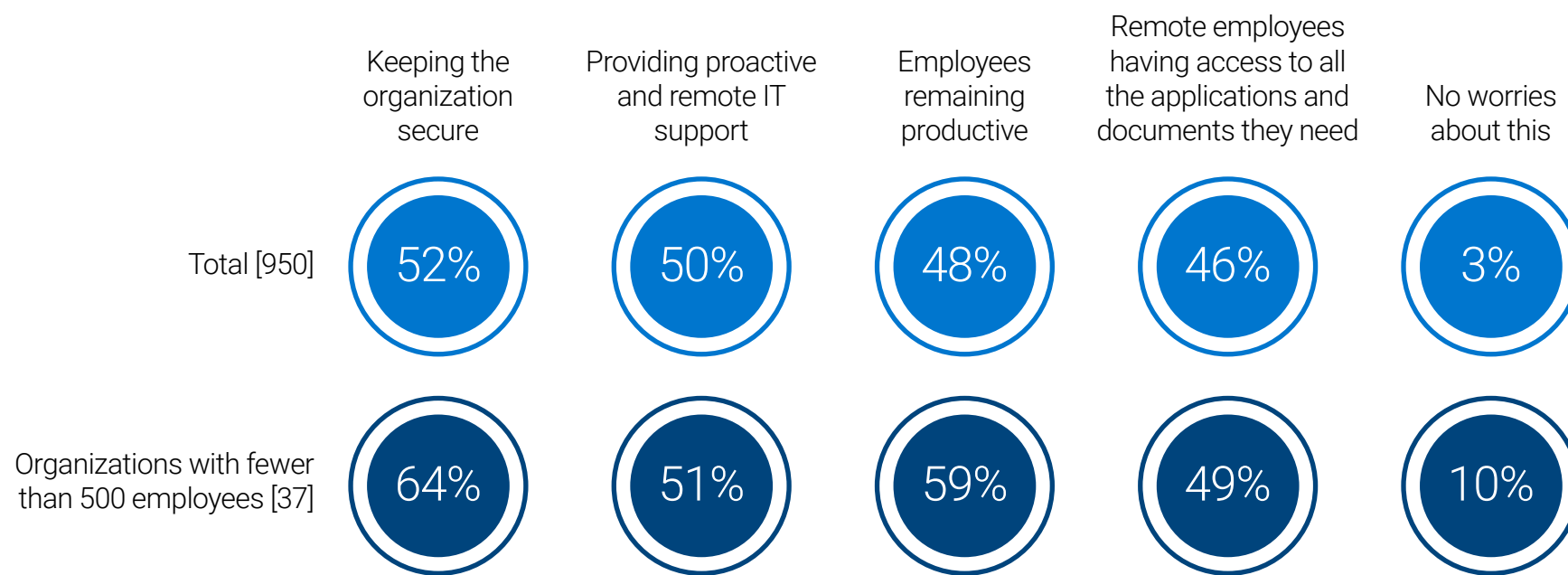


Figure 14: Which of the following are worries for you when thinking about supporting a ‘remote-first’ model within your organization?
[Base sizes in chart] split by global organization size, only showing those from organizations with fewer than 500 employees

Globally, keeping the organization secure is the main concern that CIOs have when thinking about supporting a hybrid workforce. This also adds another layer of security complexity for organizations, which they need to ensure they get right. The security worry is especially pronounced for CIOs from organizations with fewer than 500 employees, which starts to provide some insight into why they haven’t pushed further forward with their adoption of the “work from anywhere” model.

In addition to these worries, CIOs also have more general concerns about the overall improvements that need to be made to their organization in order to really embrace the “digital-first”

model. Being able to optimize collaboration tools for both remote and office workers is an area which 91% of CIOs agree requires at least a little improvement within their organization. Allowing equal access to data/information regardless of employees’ location is another area which a similar proportion (89%) of CIOs believe requires improvement.

By leveraging the very best technology, CIOs will be able to maximize their efforts when it comes to embracing the “work from anywhere” ethos. This will set their organizations up to be resilient to any future hurdles and also be in a position to reap all the benefits that hybrid working can offer.

The benefits of hybrid working

Nearly all (99%) CIOs report that their organization could experience benefits if it moved to a hybrid working model.

Benefits of moving to a hybrid working model

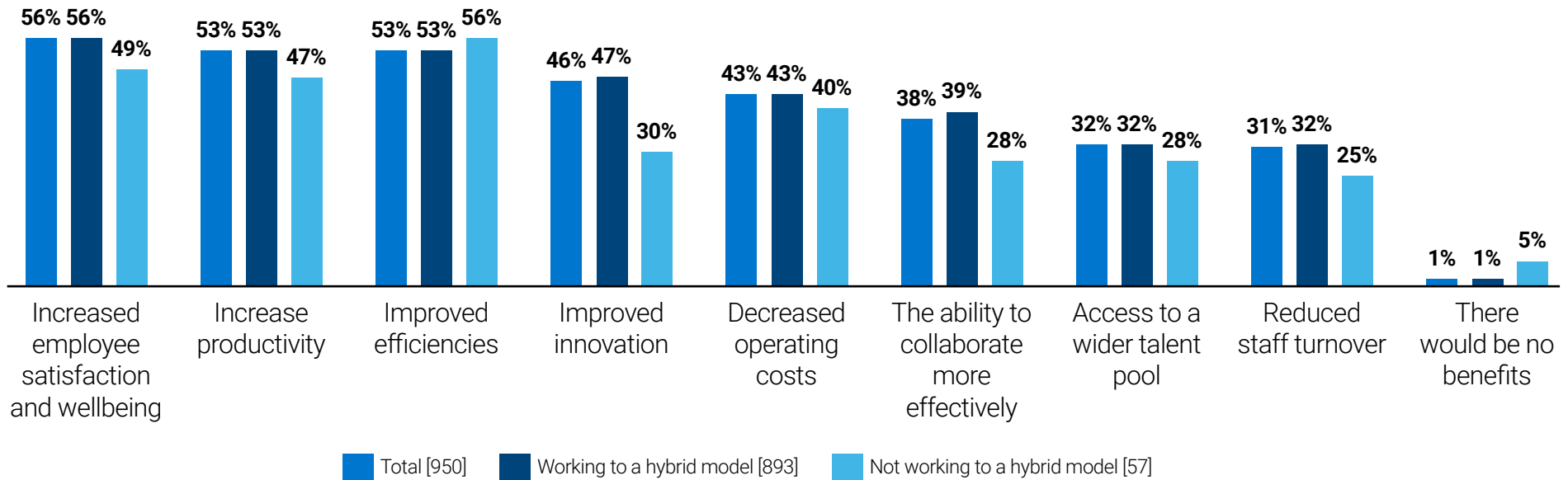


Figure 15: Which of the following benefits, if any, do you think your organization could experience if it moved to a hybrid working model? [950] split by how respondents are currently working within their organization

CIOs report expected benefits in areas such as increased employee satisfaction and wellbeing, as well as productivity levels and improved efficiencies. These benefits are heightened for CIOs who report that their organization is already working in a hybrid model. These CIOs are also less likely to report that there are no benefits at all for their organization.

When it comes to comparing different sized organizations, CIOs from companies with 3,000 – 4,999 employees are the most likely to report all but two of the benefits. Considering they are the most likely to have already implemented a “digital-first” approach, it’s clear that this model is helping CIOs to really strive in the areas detailed in figure 16, including increasing productivity.

Productivity and collaboration are both areas which CIOs report their organizations have experienced increases in over the last 12 months and they expect to continue to see similar increases in the future.

Productivity and collaboration change in organizations

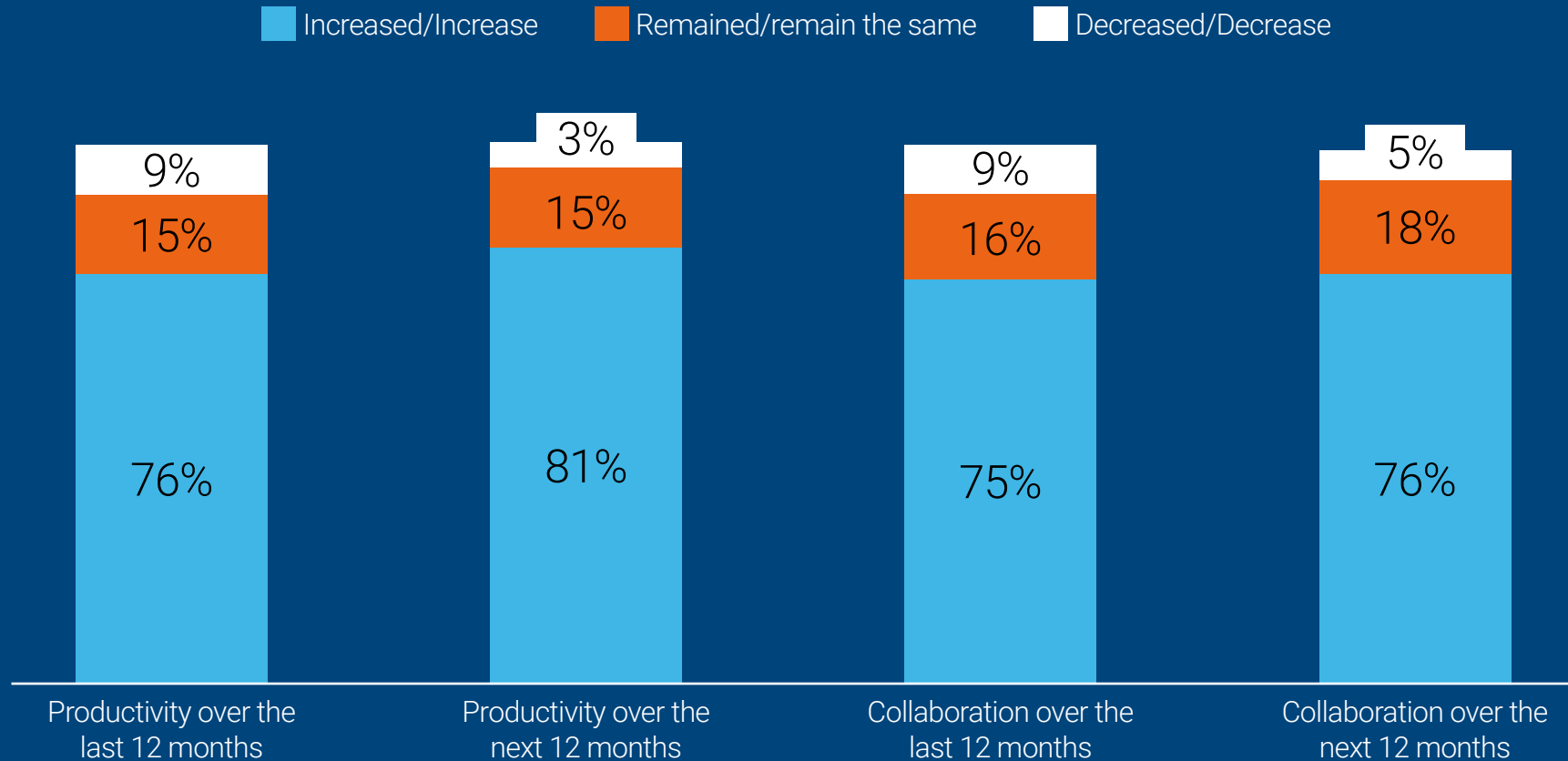


Figure 16: How has productivity and collaboration changed within your organization over the last 12 months? / Overall, how do you expect productivity and collaboration to change within your organization over the next 12 months? [950]

Being more productive and collaborative are clear benefits of hybrid work. This is exemplified when comparing productivity increases between those with fewer than 500 employees and those with 3,000 – 4,999 employees.

CIOs from organizations with fewer than 500 employees are expecting productivity to increase over the next 12 months but not by as much as it had over the last year. In contrast, CIOs from organizations with 3,000 to 4,999 employees expect productivity to increase by the same amount again. Seeing as those from the smaller organizations are less likely to be embracing the “work from anywhere” model, it’s clear that this is likely to have an impact on how productivity flourishes within their organization.

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Productivity changes in organizations

Increased/Increase Remained/remain the same Decreased/Decrease

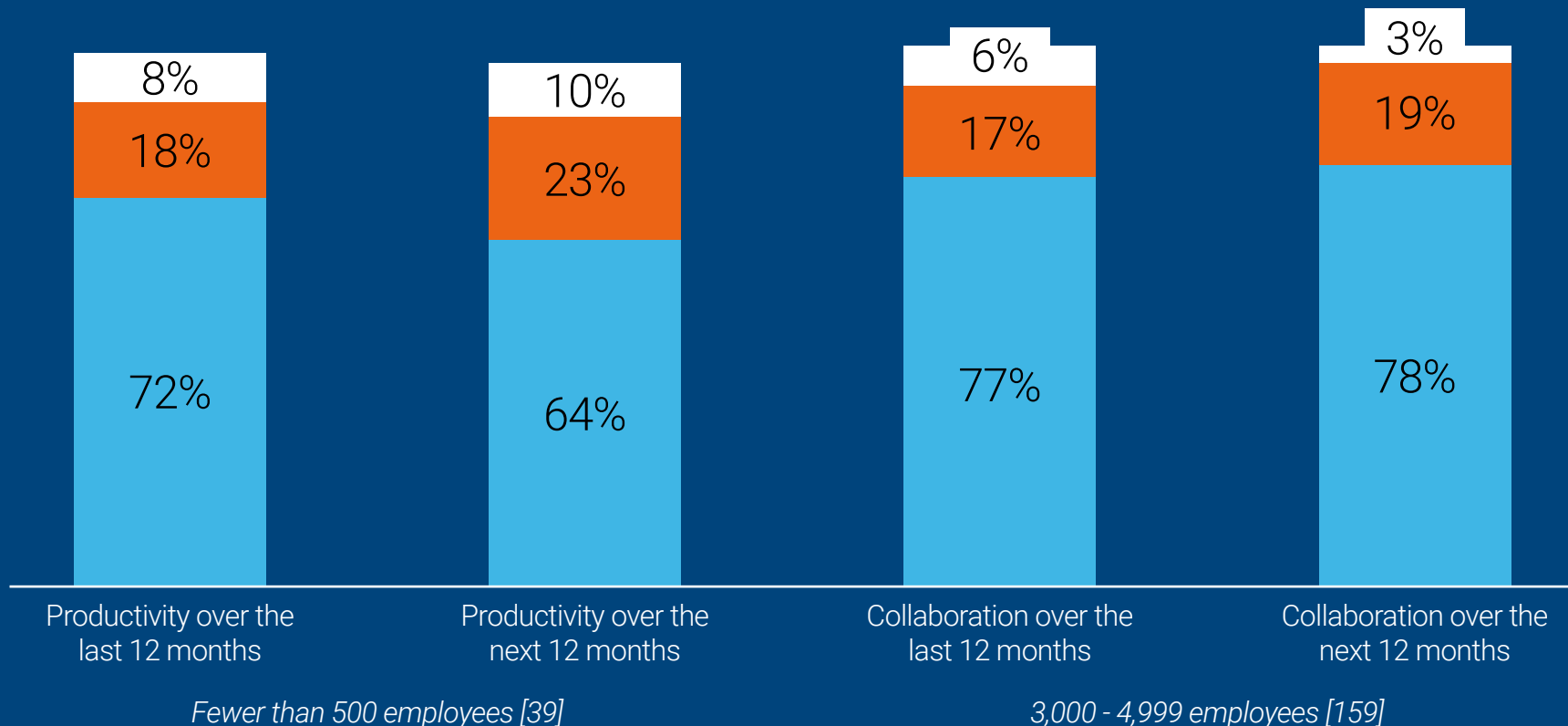


Figure 17: How has productivity and collaboration changed within your organization over the last 12 months? / Overall, how do you expect productivity and collaboration to change within your organization over the next 12 months? [Base sizes in chart], split by global organization size, showing only those with fewer than 500 employees and those with 3,000 – 4,999 employees

Conclusion

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The transition to “working from anywhere” has had profound impacts on every part of the organization. The work that CIOs and their teams have already completed on digital transformation has allowed organizations to embrace this change in working practices.

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It is now down to the CIO and their IT teams to continue to transform the business and ensure that the right technologies and systems are in place to continue with their “work from anywhere” strategy.

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This new way of working was once considered a temporary solution. It has now become a permanent fixture in many organizations, with the workforce expecting a seamless user experience regardless of their working location. This expectation has become a competitive advantage for organizations, as the geographical barriers which might once have shaped recruitment are diminishing.

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Organizations are now even more reliant on technology in order to deliver this continuous experience. Embracing technology is key in order for CIOs to successfully enable the “work from anywhere” ethos. Empowering the workforce through technology will pay dividends for both the organization and the employees that work there.

As CIOs continue to leverage technology to support this new approach, they do so with the knowledge that they are better enabling the workforce for the future.

How Dell Technologies, Intel, and VMware Can Help



No matter where your organization finds itself today, the dedicated team behind Dell Technologies will stop at nothing to help you remove the complexities that come from supporting dispersed people, applications and data. We're here as your trusted technology partner to guide you to achieve a digital workplace that's ready for anything and delivers the best possible experience.



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Together, VMware and Dell Technologies provide unique value to our shared customers. Our integrated platforms and solutions, combined with global scale and deep customer engagements, accelerate the journey to digital transformation. VMware's innovative app modernization, multi-cloud, and Anywhere Workspace software work with Dell Technologies' broad IT portfolio spanning from endpoints to the cloud to help customers achieve secure, consistent operations and faster time to value.

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About the research

Dell Technologies commissioned independent market research agency Vanson Bourne to conduct research into the state of hybrid learning and working within organizations. During May and June 2021, 950 CIO or equivalent respondents were interviewed from organizations with 100 or more employees across all public and private sectors. All interviews were conducted using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.