

A GROWING NEED FOR
CLOSER COLLABORATION AND
INSTANT COMMUNICATION

EXECUTIVE SUMMARY

Second Getronics ICT Barometer
ICT Workspace Needs and Expectations
Annual End-User Survey

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EXECUTIVE SUMMARY

- Research Objectives
- Why this Research?
- Results and Conclusions
- Methodology and Profile

- The survey stands out from similar initiatives because it's purely focussed on the end-user and on his experiences, rather than on the underlying technology or IT management aspects
- The objectives are to:
 1. Measure people's **satisfaction** of the ICT platforms and services they use at work;
 2. Understand their **expectations** and identify areas of improvement, where ICT can help increase **productivity**;
 3. Measure the adoption and maturity of tele-working and **mobility** in Belgian companies

WHY THIS RESEARCH

- The ICT Barometer points to where investment is most likely to benefit **personal performance** and also indicates areas in which development may be premature – it is a useful means of **filtering hype from reality**.
- Therefore, Getronics will use the ICT Barometer both to help steer its own development and, more importantly, to help ensure that its clients benefit from the **empirical evidence** the ICT Barometer provides of how their peers behave. The methodology of this survey is now available to all organisations that want to understand their employees' needs and expectations in order to identify where ICT can help **increase productivity**.
- The survey indicates categorically that one size does not fit all, and that the ability to respond to individual needs and preferences both contributes to a **happier** and **more productive** workforce and helps get the **best value** from ICT investment.

Belgian employees want to be able to work remotely in order to increase their efficiency.

Slowly but surely, employers start recognising and encouraging this trend

- Users clearly **expect** that their ICT workspace would increase their efficiency
 - ✓ ‘Locate the right information’ (84%), ‘share knowledge’ (75%) and ‘understand their colleagues availability’ (74%) are considered the most efficient functionalities
 - ✓ All functionalities rank above 50%
- When mapping the needs against the expected efficiency increase, ‘sharing knowledge via the intranet’ turns out to be the **killer service**

- The ability to **work remotely** and in an **integrated way** is a critical success factor
 - Flex working has increased from 31% to 37%
 - Wireless internet access in the office has increased from 47% to 55%
 - 72% strongly believe they would be more productive if they would receive all communication (e-mail, phone calls, instant messaging,...) on one device
 - 67% strongly believe they would be more productive if they would have remote access to the company network
 - 51% has a laptop
 - 13% has a smartphone

When mapping the usage of the different ICT tools against their perceived added value, 5 killer services show up: search engines (89%), calendar sharing (90%), presence management 81%, videoconferencing (73%) and webconferencing (80%).

- People strongly believe ICT can help them to deliver higher **quality of work**. Compared to 2008, the formal communication tools make a big jump forward in terms of perceived added value:
 - ✓ Webconferencing : from 73% to 80%
 - ✓ Videoconferencing : from 67% to 73%
 - ✓ VOIP : from 48% to 54%
- Mobile devices like PDAs and smartphones (from 62% to 70%) and podcasts (from 21% to 27%) are also increasingly perceived as tools that improve efficiency

Although the usage of the various ICT tools has increased in 2009, there is still a major gap between the users' expectations in terms of efficiency tools – which is very high - , and the availability of these tools – which is rather low

- Compared to 2008, **usage** of the various ICT applications has increased :
 - ✓ Wikis (from 18% to 24%), instant messaging (from 31% to 40%) and VOIP (from 22% to 29%).
 - ✓ **'Search' (81%)** and **'Calendar Sharing' (71%)** remain the 2 killer applications
- But : more than 30% of the end-users don't have access to a search engine or to 'calendar sharing' , while 90% of them says these tools (would) greatly improve their efficiency
- Other tools with a high perceived value are 'presence management'(according to 81% of the respondents), webconferencing (80%) and wikis (72%). But only 32% of the end users have access to 'presence management', 19% to webconferencing and 13% to wikis

RESULT 4 – CORPORATE INTRANETS ARE NOT POPULAR

Although the vast majority of the companies (91%) have an intranet including lots of functionalities, only 15% of the employees are actually using it.

- Access to documents' (from 90% to 92%) and 'search engines' (from 83% to 89%) are the most offered ICT tools on the intranet, followed by 'self-service portal' (69% - unchanged) and FAQs (from 73% to 68%). Version management and discussion fora are offered in the intranet by less than 50% of the employers.
- But only 10% of those surveyed are using the intranet to access documents, to find information and to visit the Self Service Portal.
- And only 15% are using the intranet to collaborate online, to approve workflows and for version management. This indicates most of the corporate intranets are still considered as '**one way**' **information** source rather than as **interactive collaboration** platforms

RESULT 5 – HOMEWORKING: NOT REALLY FACILITATED

The percentage of employees that works from home (almost) every day has increased from 9% to 14%. On average, they gain 4,7 hours per week. But 1 company out of 2 doesn't have a policy on working from home.

- 52% of the employees sometimes work from home (versus 48% in 2008). The percentage of employees that works from home (almost) every day has increased from 9% to 14%.
- 60% of the employees working sometimes from home state that they are (a lot) more efficient .On average they gain 4,7 hours a week by working from home.
- Only 10% of the employees receives an extra allowance for working from home.
- 38% of the companies have a policy on working from home, but most companies (53%) don't.

RESULT 5 – HOMEWORKING: NOT REALLY FACILITATED

- Remote access to email has increased from 57% to 62%, and to the intranet from 47% to 52%.
- Despite these increases, 50% of the employees still cannot access their corporate intranet from home, and 1/3 cannot even access their mail.
- With regard to communication tools, figures drop even further : only 20% of the homeworkers have access to presence management, only 12% to webconferencing and 7% to videoconferencing
- Most employees who don't work from home state that it is not possible in their type of job (52%) or that it is not allowed in their company (31%).
- More than half (57%) of the employees who don't work from home would definitely or maybe like it.

RESULT 6 – USERS GET MORE AND MORE DEMANDING

- Compared to December 2008, the general satisfaction level has slightly decreased , in particular the extent to which ICT tools help to deliver quality work, the reliability and quality of the ICT tools and the speed of the system
- Speed will always be grounds for dissatisfaction. Once you get used to a four second response time, for example, you want things to happen in two.
- Satisfaction with support remains a sensitive area. If somebody is experiencing a problem and needs help, they are more likely to be feeling negative before they even connect to the support network. As a provider of ICT support, Getronics recognises that the best way to address this dissatisfaction is to deal with problems before they occur wherever possible, and to set expectations for support accurately.
- Overall trend: users get more and more demanding

Fieldwork

- Employees were recruited from the InSites online research panel. The InSites opt-in research panel consists of more than 500.000 panel members in Belgium.
- Fieldwork period: 16 December 2009 -4 January 2010

Sample

- Country: Belgium
- Active professionals between 18 and 65 years old
 - Working full-time or part-time
 - Needing a personal computer or laptop on the job
 - Working for a medium or large company (50+ empl.)
- 60% Dutch speaking / 40% French speaking
- Exclusion of self-employed and (un)skilled labourers
- Total sample size: n=1.585





- Most employees work in the Banking & Finances sector (20%) or Industry sector (19%). The ICT (14%), Services (13%) and the Non-profit (12%) sectors follow closely. 10% of the participants is employed in the Government sector. The Government and Non-profit sectors combined, results in the largest sector (22%).
Most people who are working in the Government sector work for the federal government (45%).
- 45% of the employees is an executive, 55% holds a management position.
- Half of the employees work for a large company (more than 1000 employees), a quarter works for a company with 100-500 employees.



- 2 out of 3 employees have worked for no more than 3 different companies. For almost a quarter (23%) the current job is their first job. A large part (28%) of the employees in this study is with the company for 1-5 years. A lot of employees (29%) have been working in the same company for more than 20 years.
- A vast majority (82%) of the employees needs a computer for most of the things they do in their job.
- 45% of the employees has a (very) good knowledge on ICT and 5% qualifies themselves as an expert. One third (33%) has limited knowledge and 8% states to have almost no ICT knowledge.

Our View on the 21st Century Workspace

A Basic Need

High impact on end user satisfaction and productivity:

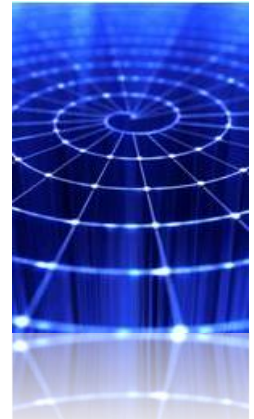
a solid workspace platform is one of the strongest enablers of productivity



Profiled

Different users have different needs and expectations:

a one-size-fits-all solution will never deliver an optimal degree of productivity and satisfaction



Not Just Technology

It is about the right balance between People, Process & Technology:

Don't limit Workspace discussions to the evaluation of HW and SW



Standardized

Offer flexibility through standardization:

control TCO by managing diversity within a standardized core

