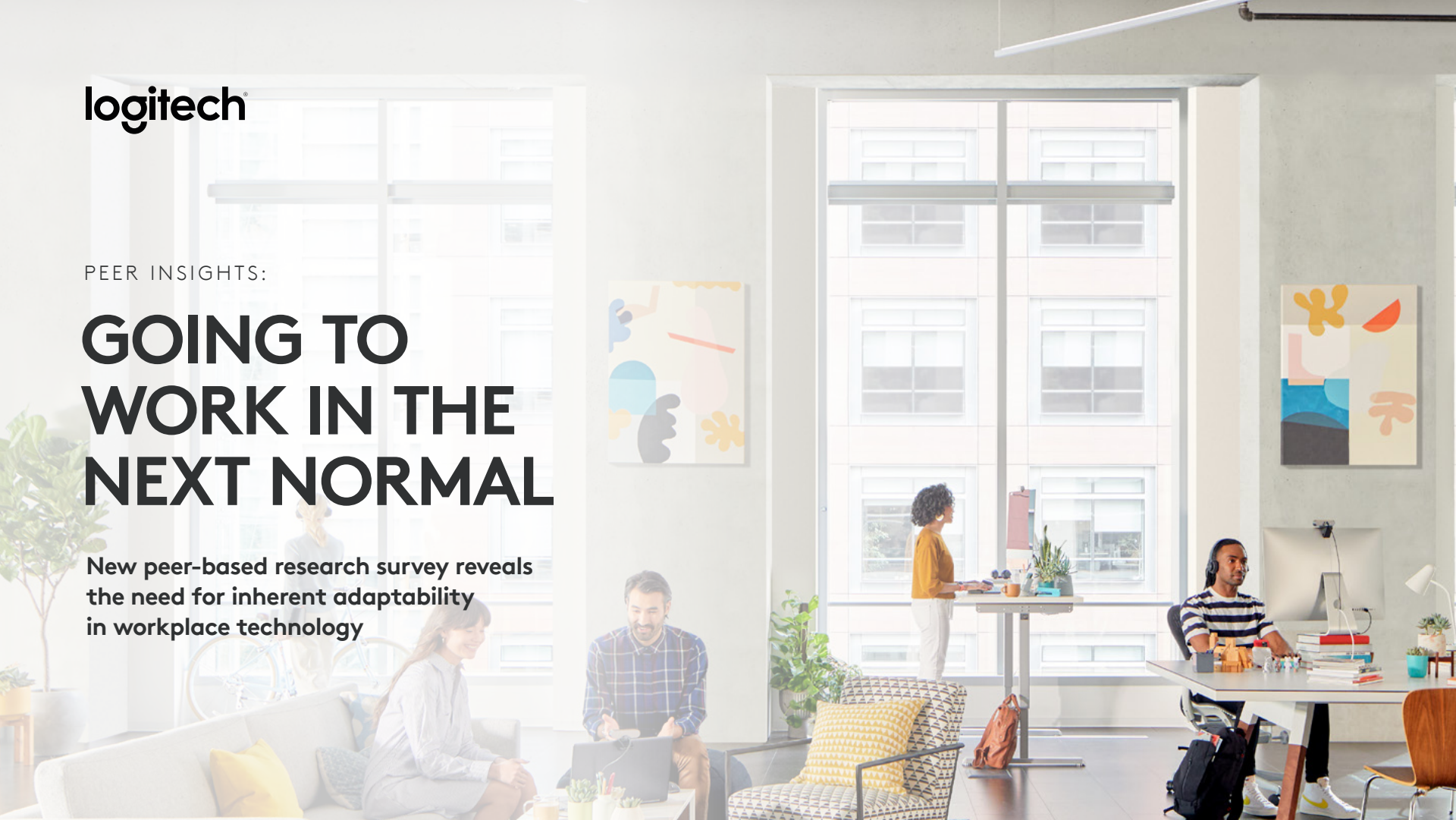




PEER INSIGHTS:

GOING TO WORK IN THE NEXT NORMAL

New peer-based research survey reveals
the need for inherent adaptability
in workplace technology



INTRODUCTION

Over the years, workplaces have evolved, removing the walls and barriers that once separated teams in favor of open workspaces that foster collaboration. As these have taken shape, technology has followed suit, providing the flexibility to work from virtually anywhere, at anytime. But while advancements have changed the way companies think about remote collaboration, we hadn't yet seen the full impact of what a truly collaborative workplace could be.

But then, in 2020, that all changed, with the COVID-19 pandemic creating a much more significant shift in our workplaces, in a much shorter time frame.

In just a few weeks, businesses around the world found themselves taking immediate steps to entirely reimagine the traditional "office", while ensuring that their people could work effectively from home. Top priority for many was video communication tools that would allow their teams and colleagues to stay connected, efficient and engaged where they were working – seen in the [unprecedented rise](#) in the use of video collaboration tools, the number of Microsoft Teams video users multiplying, and [Zoom](#) doubling its annual sales forecast since mass work from home (WFH) began.



As things began to settle, predictions for the post-pandemic world emerged. And while most seemed highly speculative, there's one thing all agreed on: life and work as we knew them will not be the same. The 'next normal' will inevitably involve a change in working life, with employees shifting seamlessly between office and remote locations, new strategies for balancing productivity, collaboration and health at work, and businesses needing to be inherently adaptable about workplace management.

To understand this change and its impact, Logitech spoke to leading global businesses on how they're planning to approach this transition, on how they managed the lockdown period, and on their views about the viability of the office. In this report, you'll discover:

- How businesses responded to COVID-19 and the pressures it placed on their tools, technology and workspaces
- The pivotal role video conferencing technology will play, as a hybrid remote and office culture emerges
- What the return to the office looks like, and how your peers intend to go back
- Why the hybrid approach to remote and office working is a huge opportunity to foster a culture of collaboration and productivity, if handled correctly

WHAT IS THE NEXT NORMAL?

The period immediately following the Coronavirus outbreak and the worldwide lockdown was referred to as a 'new normal'. But for all its influence, the strict rules and measures were temporary.

The next normal is what comes after – a long term adjustment that will shape the next decade of working life, and a fundamentally new way of operating with technology at the heart.

OUR RESPONDENTS, YOUR PEERS

Our survey spoke to 225 director and senior management technology leaders at global enterprise businesses. All are influential, international organizations in industries including banking and finance, technology, transport, education and health. We asked them about their offices prior to and post-COVID-19, the technology they use to maintain business continuity, and the role of video conferencing in their organizations.

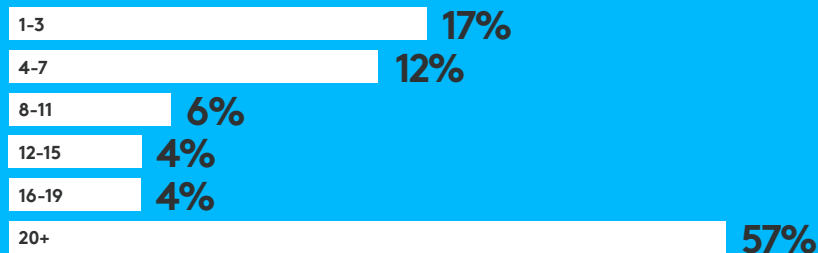
39%

work for businesses with over 10,000 employees

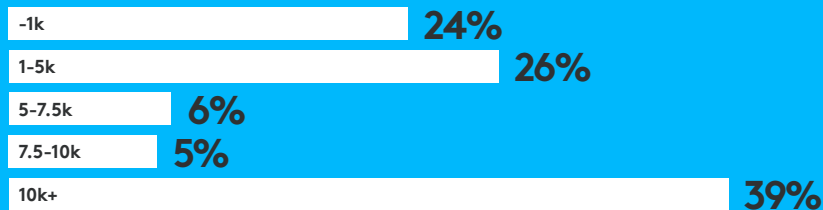
57%

work for businesses with a presence in over 20 countries

How many locations do you have globally?



How many full-time employees does your organization have?



OUT OF OFFICE

The COVID-19 pandemic caused office and workplace closures in every major economic hub. Although the speed and severity of lockdown differed depending on region, by April 2020 everyone was in more or less the same place – working from home, concerned about the future, and searching for ways to make their living space function more like their office space.

For some people, the move away from the office was relatively easy. Their businesses had already invested in solutions that made the transition from one workspace to another relatively seamless, so collaboration didn't take a hit. Others were caught off guard, finding themselves searching for quick fixes to problems they never expected to have with such criticality. That meant moving desk equipment home, asking employees to buy equipment, or learning as they were going.

Peer Quotes: Does asset management now include home office/mobile solutions for each employee?

.....
"A lot of people have taken their desk setups home to use in the meantime. I am unsure how this will change going forward."

.....
"Employees have what they need to work from home. Lessons learned will be assessed to determine improvement opportunities or gaps."

.....
"Depends upon circumstance, bringing home a laptop is acceptable, purchasing equipment for home use is not acceptable."



A mixed response

A recent [BBC](#) article on remote working revealed that only 3.6% of US and 4.7% of UK workers were remote pre-COVID-19. For many, remote work wasn't part of life.

But the changes brought about by COVID-19 aren't temporary. And when 59% of remote workers indicate a desire to continue for the long term, businesses have to find permanent answers to the questions the pandemic raised. The challenge is that while remote working capabilities have advanced in recent years, in many cases there's work to be done before everyone can be as effective from home as they are in the office.

What this reveals is that many businesses have made the right steps towards a collaborative working environment, regardless of whether their people are in offices or their one-person workspaces, but there is room for growth. The increased presence of video conferencing platforms like Zoom, Microsoft Teams and Google Meet illustrate this.

Does asset management now include home office/mobile solutions for each employee?



42%

of businesses don't include home or mobile solutions in asset management.

Peer Quotes: How the need for video collaboration has changed post-COVID-19

.....
"All users moved to MS Teams only. Teams meetings have increased by over 50%."
.....

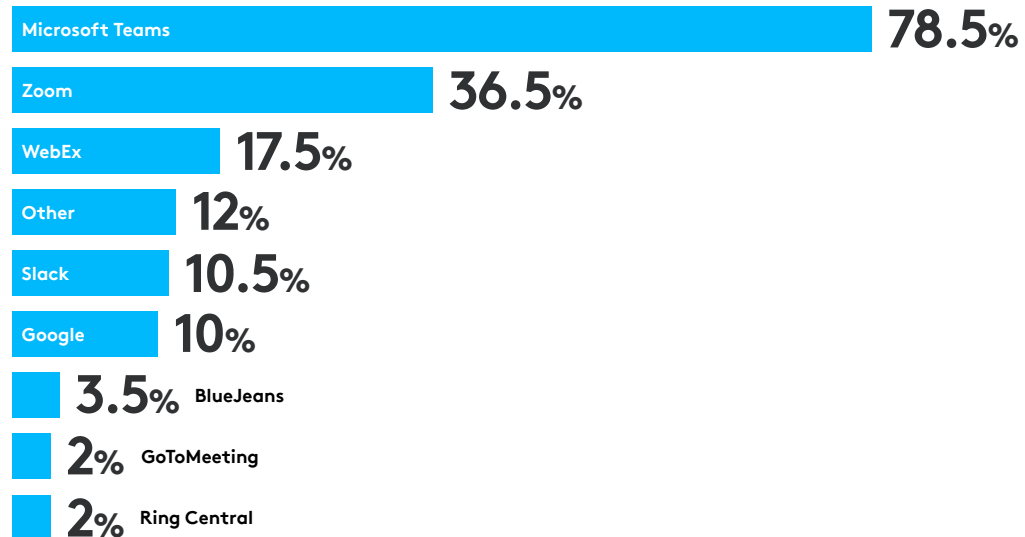
.....
"A huge change. We went from doing 50 video calls to doing hundreds of calls daily."
.....

.....
"It has not changed but it has speeded up the process 150%. Plans to be 60% hybrid capable by 2023 changed to right now."
.....

.....
"I am embracing a support everything under the sun model."
.....



What tools have you invested in/rely heavily on to help with maintaining business continuity?



KEY TAKE AWAYS

Many businesses are already in place to make the next normal work, providing remote working technology to their employees. Others still have room to grow and improve how they foster collaboration in a hybrid working model.

Video conferencing technology has seen heavy investment. The next step is to ensure the investment is up to the task with remote management that scales to thousands of meeting room devices.

Technology like headphones and webcams will be crucial in the next normal. With remote working here to stay, it's important that the technology experience at home is as good as it is in the office.

THE HYBRID OFFICE ERA

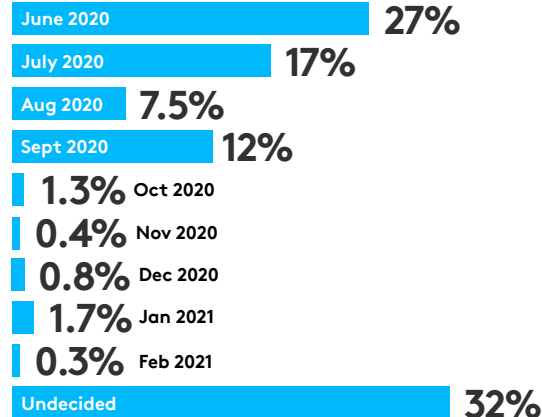
Despite the move towards – and in some cases affinity for – remote working, there’s also a general recognition that workers will return to the office in some capacity. **41%** of peers surveyed intend to keep 100% of their office locations over the coming **12-24** months.

What this return looks like, however, differs for almost every business, with varying plans among peers on when to get back to a safe working environment.

“When asked about the relevance of the office, **74%** said the open office is still relevant, **26%** said it isn’t.”

“Over three quarters favor a gradual return to the office, beginning with **25%** capacity and going from there.”

When do you plan to begin to have employees return to the office?*



*Survey results were captured prior to June 5, 2020



DO YOU PLAN TO TAKE A PHASED APPROACH BACK INTO THE OFFICE AND IF SO, WHAT DOES THAT LOOK LIKE?

77%

We will start with a smaller number of employees returning to the office <25% capacity and gradually increase over time.

14.5%

We will start with <50% capacity and gradually increase over time.

2%

We will start with <75% capacity and gradually increase over time.

6.5%

When we go back most employees will return to the office.

Where things begin to get a little clearer is in the need for continued remote working, and a hybrid approach that will see employees dividing their time between locations.

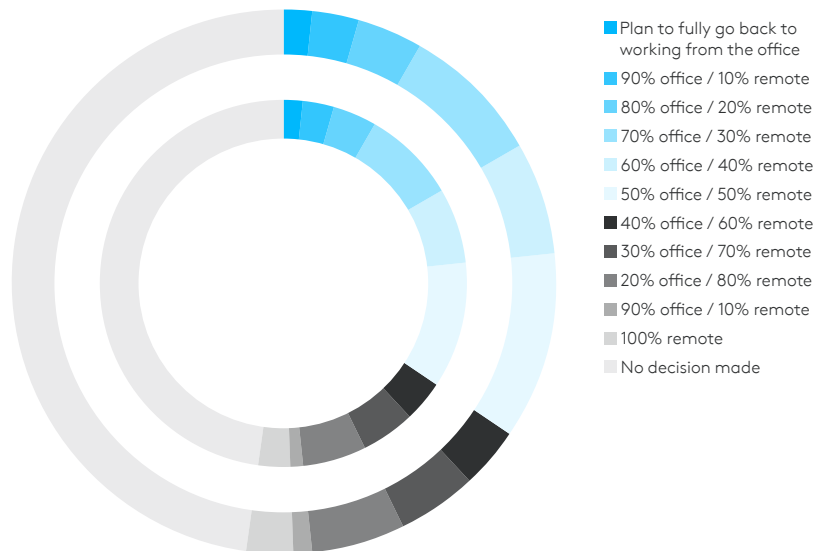
A new way of working

Fewer than 2% of respondents said they plan to go fully back to the office when they can do so. And while others were divided in what split they might expect in the future, it undoubtedly points to a different approach to the pre-COVID-19 era.

But what about how the office space will look going forward? Some see the future as a more spaced out version of the present. Others are moving back to the siloed cubicle world of the nineties. Many are still unsure, and open responses from undecided peers reveal businesses considering hot desking, using meeting rooms as offices, and working in shifts to reduce occupancy.

“With fewer than 2% of respondents planning a full office return, the need for video connections between workers is going to continue to grow as we approach the next normal.”

Will remote work become a more accepted option in your organization post-COVID-19? And if so, what does that ratio look like?



What is the approximate ratio of room size to total rooms?

Small/Huddle (%)



Medium (%)



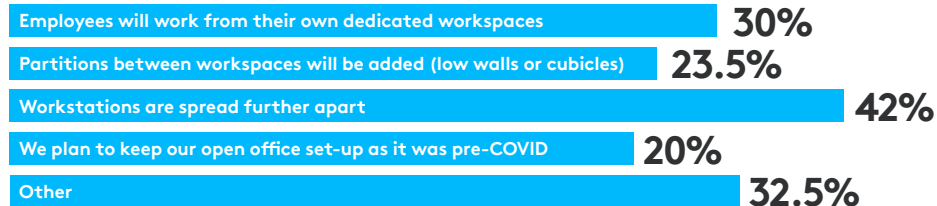
Large (%)



Other (%)



Does your office space look different? How?



What this means in practice:

- The next normal means hybrid working as a matter of course. Almost no employee will be either solely office-based or solely remote.
- To make this work and ensure continued collaboration, businesses will require technology that supports employees, regardless of their environment.
- Offices will change to become COVID-19 safe spaces, where people can work together without compromising their safety.

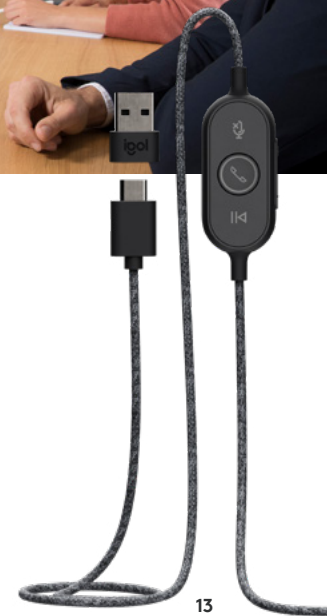
The culmination of the changing office, a sustained rise in remote working, and ongoing health and safety concerns inevitably puts an increased demand on tech leaders. Fortunately, tools are available to aid in all of these areas – and to create opportunities for improved ways of working, rather than compromised processes.

Video conferencing has meant that colleagues can remain collaborative and dynamic instead of suffering from a lack of face-to-face contact. And for global businesses, where teams use video to work across borders as a matter of course, it means geographic barriers matter less than they ever have.

Put simply, the next normal isn't about working around a tricky time. [It's about using technology to bring people closer together](#) – even when there's oceans between them.



“The top three biggest concerns for workplaces as they move towards the Next Normal are, health and safety, maintaining financial stability and the general uncertainty of the future.”



KEY TAKE AWAYS

1. Hybrid working will require new technology at the office and at home. Companies are realizing that investment in business solutions for personal workspaces that can keep up with in-office tools is on the rise, and that this technology will empower employees to seamlessly flow between the two workspaces with ease.
2. Business quality webcams reduce the strain and improve interaction in a video call that is otherwise plagued with blurry images or poor lighting. As companies shift to adopt a more permanent remote work model, these tools tremendously improve collaboration and remove meeting fatigue.
3. Not every meeting needs to be a video call in this new hybrid model of remote work. In fact, it's perfectly acceptable to take a break, and turn off your video camera. High quality audio is still critical to productive meetings – but sometimes that's all you need and that's okay.



BALANCED BUSINESS

As well as revealing some gaps and improvements in businesses as they prepare for the next normal, Logitech's research also highlights some balanced workplaces that offer best practice guidance. These businesses generally have been working with video conferencing technology (both platforms and hardware) for some time, and have an engrained, accepted remote working culture.

Achieving this balance has meant they are collaborative, efficient and creative places. Here's what others can learn from them:

The balanced business at home

Remote workers in a balanced business that's embracing hybrid working tend to be equipped with dedicated solutions and technologies that are fit for remote working on a permanent basis. Including [headsets](#), [webcams](#), [mice](#) and [keyboards](#) that mean video meetings feel just like they would in person.

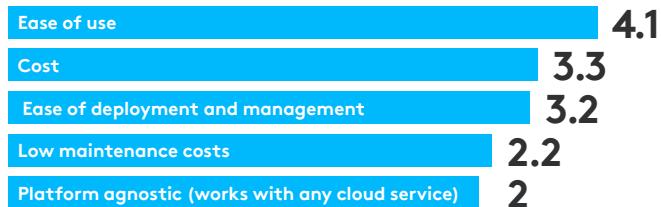
Your peers have stated that their employees sometimes lack the business-grade equipment that's needed to effectively collaborate to the best of their ability for a sustained amount of time at home. Instead, they're using personal products they already own – most likely consumer-grade solutions, not intended for the demands of a full-time job, or ineffective workarounds (how many calls have you seen where someone is using their smartphone headphones?)

The reason for this may be that many businesses saw their reliance on video conferencing rapidly increase after COVID-19, with one respondent experiencing 'a rush to get employees webcams and headsets for virtual meetings'. Their next step is to match this increased reliance with improved tech.

"Ease of use is the greatest need for new video conferencing hardware."



Please prioritize your needs when it comes to video conferencing hardware selection.



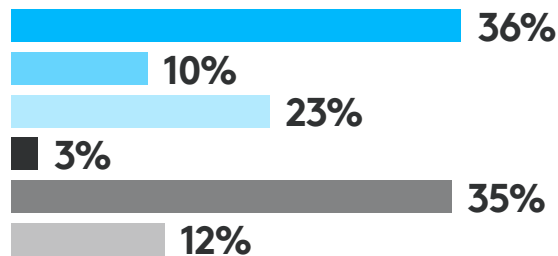
The balanced business in the office

The next normal will mean an increase in meeting rooms for most of your peers, as offices change shape for a world where teams and departments will rarely be together.

Naturally, this means more conference cameras will be required to turn huddle or break out areas into dedicated meeting spaces. And in many cases businesses will need this hardware to be specifically set up to work with their conferencing platform of choice – be it [Zoom](#), [Microsoft Teams](#), [Google Meet](#) or another.

46% will need either more meeting rooms or larger meeting rooms in the next normal.

Do you anticipate an increase in the number of video-enabled meeting rooms in your office locations?



- We will need more video rooms to support the increase in remote employee collaboration from the office.
- We will shift to larger meeting rooms to accommodate for more space between in room participants/attendees.
- We don't plan to change the number of video-enabled meeting rooms we currently have.

- We plan to have fewer video-enabled meeting rooms than we did going into this.
- We are unsure of what our needs will be until we are back in the office.
- Other





Is your office safe?

Getting an office ready for the next normal is about more than collaboration. Unlike remote environments, there's an employee health and safety aspect to consider. And no matter how many partitions and one-way traffic signs a business puts up, there will be times when people collect together.

Understandably, when asked an open source question about their top priority for the return to the office, most respondents cited safety. Which is why many leading businesses are looking at solutions that are easy to clean, maintain and use – [enhancing contactless collaboration](#) and allaying the concerns some employees will have as they return to the office.

“Safety is the top priority for the majority of organizations when transitioning to the next normal.”

KEY TAKE AWAYS

1. Balanced businesses will increase their procurement of technology like room controllers, headsets and cameras to be adaptable, and to make meetings and working productive and engaging, regardless of environment.
2. Conferences can be safer by reducing the number of touches required for setting up and running a meeting. Contactless tools that work with other technologies like Alexa and Zoom can enable employees to start a conference using voice command, reducing their physical interaction with their space.
3. Ease of use is going to be important for remote workers. With significantly reduced (or possibly zero) time with IT specialists for support, they're going to need plug and play, user friendly technology that requires little set up time or expertise to use.



INHERENT ADAPTABILITY FOR THE NEXT NORMAL

While some of the changes the next normal requires might seem far reaching, many leading businesses are already well on their way to making them happen. Remember, while 42% of remote workers don't have their home or mobile solutions under asset management, 58% do. And with almost all businesses experiencing a greater need for video conference meetings, plans are underway to bring in the technology that will get the best out of them.

These future-facing businesses won't only be better suited to navigating the complexities of 2020 and beyond, they'll bring their teams closer together, regardless of location; they'll ensure that hybrid working is collaborative, rather than disruptive; and they'll adapt to whatever the future of business life is, safely and successfully.



Want to know more about how Logitech will support customers transitioning to the Next Normal?

Learn more, www.logitech.com/vc

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Contact your reseller
or call us at 800-308-8666

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