451 Research

S&P Global

Market Intelligence Business Impact Brief

Enabling Workforce Digital Transformation and Agile Collaboration for Deskless Workers

The 451 Take

Deskless workers are critical components of a wide range of vertical markets and use cases – including security, facilities management, retail, energy and mining, transportation, hospitality, manufacturing, and healthcare – but they have been largely underserved by business communications and collaboration tooling. Collaboration technology typically targets desk and knowledge workers who can view screens for long periods and do not have to keep their eyes up for safety and productivity reasons.

Workforce productivity and collaboration processes are constantly changing, with ebbs and flows brought about by changes in the economy, new work models and shifting market demands. However, the COVID-19 pandemic and the subsequent steps that organizations took to combat the crisis have brought waves of a different magnitude than many of the environmental changes that came before it. In response, the working world is becoming increasingly dynamic, laser-focused on productivity and results, and (in some cases) almost entirely remote.

Main IT-Led Priorities for Digital Transformation Leaders

Source: 451 Research's Voice of the Customer: Macroeconomic Outlook, Corporate IT Spending, Digital Transformation 2020 Q: In your opinion, what are the main IT-led priorities in digital transformation? Please select all that apply.

Base: All respondents (n=502)

Laggards Leaders Improve employee collaboration and productivity tools 47% Intelligent automation to reduce/remove need 21% 46% for labor and manual processes Multiple cloud platforms to support flexible 15% 37% delivery of business applications Achieve a unified customer profile and 32% single source of customer information Modernize legacy back office applications 20% 32% (e.g., ERP, supply chain) Support for continuous uptime (i.e., improved reliability 32% of systems, networks and infrastructure) Proactive risk mitigation (e.g., advanced threat 32% prevention, security management) Modernize legacy front office applications 18% 30% (e.g., CRM, e-commerce) Gain richer sources of data for line-of-business 27% decision-makers 16% Mobilize business applications 21% We have a formal strategy and are actively digitizing We currently have no digital transformational strategy our business processes and technologies

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The 451 Take (continued)

The shift to remote work and the central role that frontline workers have played during the COVID-19 quarantine have placed a spotlight on their criticality and the importance of enabling the digital employee experience for deskless workers. The pandemic is accelerating digital transformation initiatives in the workplace. Our Voice of the Enterprise: Digital Pulse, Coronavirus Flash Survey October 2020 shows that 44% of respondents expect that their organizations will continue to operate under altered conditions through 2021. These conditions are making secure remote collaboration a top priority for organizations that aim to differentiate based on their digital transformation leadership – ahead of other initiatives including risk mitigation, ensuring continuous uptime, modernizing and mobilizing business applications, and supporting different cloud platforms (see figure above).

It's not just IT; the C-suite is becoming increasingly cognizant of how organizational objectives are frustrated by the pervasive friction across employees' daily work. Top executives are also realizing that deskless workers are an extremely important sector that requires fresh investment, and they are beginning to prioritize strategies to rectify that.

Business Impact

AGILE OPERATIONS. Secure collaboration and productivity are critical for enabling an agile operating approach in a distributed work environment. Enabling secure collaboration and productivity in a distributed work environment entails addressing numerous communications requirements such as end-to-end encryption; multimodal, group and 1:1 capabilities; low latency; being device- and network- agnostic; and the ability to handle unlimited range. As organizations adjust their operations in response to ongoing and increasing business pressures, which have been compounded by the COVID-19 pandemic, an agile operating approach that encompasses frontline and deskless workers – i.e., where 'the rubber meets the road' – can enable organizations to execute more rapidly, efficiently and effectively.

REAL-TIME, INTELLIGENT VOICE-FIRST TOOLS. Such products are key factors for enabling an agile operating approach in the front lines. While this is the case for nearly all employees, the need for workforce transformation, real-time intelligence and agile collaboration is particularly evident with frontline and deskless workers that require a 'heads up, hands-free' approach for various reasons such as productivity, safety and better customer engagement. Key use cases are in industries such as security, facilities management, retail, energy and mining, transportation, hospitality, manufacturing and healthcare.

COST SAVINGS. Productivity improvements deliver an obvious return on investment, but safety improvements can also drive dramatic cost savings. According to the National Safety Council, in 2019 the US experienced 105 million days lost to work-related injuries at a total cost of \$171bn. 'The true cost to the nation, employers, and individuals of work-related deaths and injuries is much greater than the cost of workers' compensation insurance alone,' according to the National Safety Council.

IMPROVED COMMUNICATIONS. This shift to agile collaboration presents new communication challenges and requirements. Functionalities such as mobility, voice user interfaces, geolocation and voice-enabled bots can empower the deskless workforce, helping them stay connected and become more productive. According to our Voice of the Enterprise: Workforce Productivity & Collaboration, Technology Ecosystems 2020 survey data, voice-enabled bots are among the top technologies that will transform business operations in the next two years.

Looking Ahead

Deskless workers are becoming increasingly relevant post-pandemic. As they continue to operate under altered conditions and flexible work arrangements become permanent for a substantial number of employees, organizations will need to evaluate their business communications infrastructure to address the requirements of a distributed workforce. This includes addressing compliance requirements, end-to-end encryption, and mobile-native capabilities for use cases involving deskless and frontline workers, which have typically remained beyond the scope of traditional business communications.



Orion is the leader in enabling workforce digital transformation and agile collaboration for the deskless workforce. Learn about how Orion can support your communication needs and connect your deskless workforce – www.orionlabs.io.