FORRESTER®

The Employee Experience Chasm Between Frontline And Desk-Based Workers

An Anywhere-Work Strategy Must Include All Employees

Table of Contents

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Executive Summary

The recent global disruptions due to the COVID-19 pandemic will impact society, the economy, and policies for a long time. Some systemic risks will only become visible over time. Having an adaptive, flexible, and agile operation is therefore a matter of business survival.

We have already seen many changes, such as a large-scale shift to remote working. But we are also just at the beginning of a fundamental transformation. In this emerging new normal, customers will shop differently, employees will transform the way they work, and citizens will engage with governments differently.

Business leaders must not yearn to return to how things were. The new normal requires organizations to maintain flexible remote working policies and the technology infrastructures to support them. This will enable organizations to provide good employee experiences (EX) to all of their workers.

Fujitsu commissioned Forrester Consulting evaluate the state of hybrid/remote work for desk-based and frontline workers. To explore this topic, Forrester conducted an online survey with 164 HR leaders responsible for EX at global firms that have already established or plan to establish hybrid/remote workplace models. We found that most firms were not prepared for remote/hybrid work and that they still neglect frontline workers.

The new normal requires organizations to maintain flexible remote working policies and the technology infrastructures to support them.
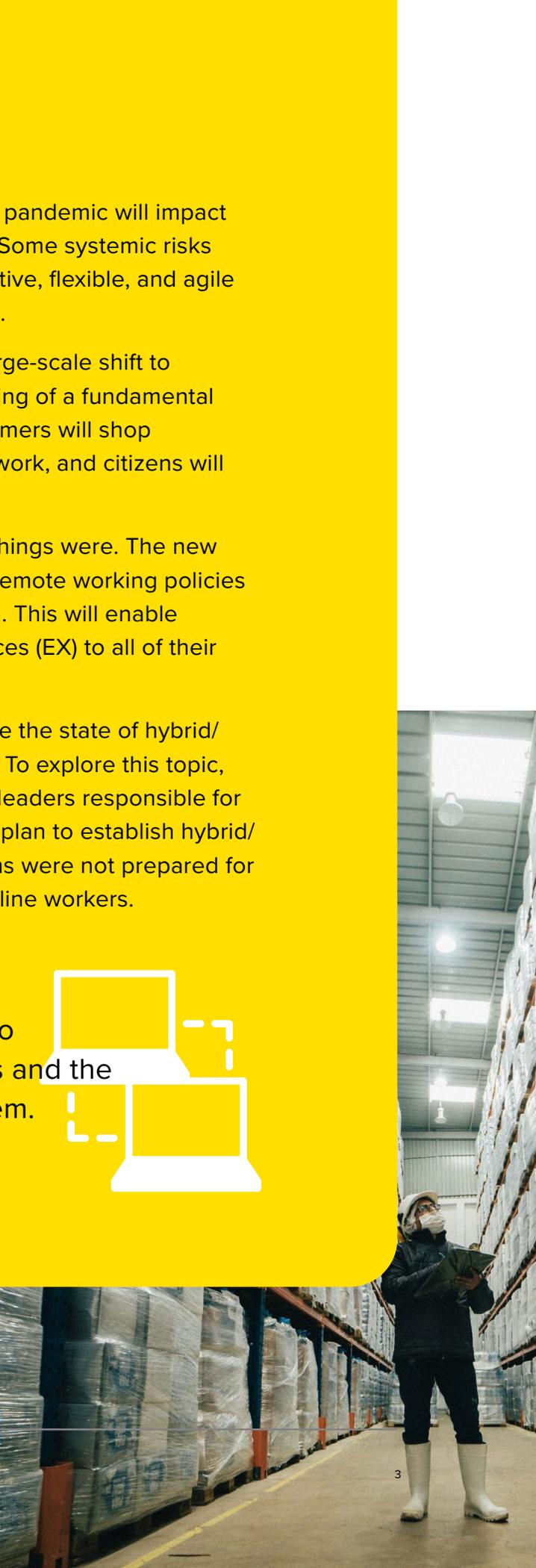
Key Findings

Today's remote work policies leave frontline workers behind.
Global disruptions from the pandemic caught firms unprepared to use a flexible work model, pushed them to quickly shift their hybrid/remote work strategies, and shaped frontline workers' expectations for increased flexibility. However, there is a big gap in experience for frontline workers and desk-based workers. Organizations made fewer policy changes to hybrid/remote work for frontline workers and placed less focus on their impacts on business resiliency or EX.

Organizations struggle to create comprehensive hybrid/ remote work models. Nearly all surveyed HR leaders (99%) said their firm experiences challenges with implementing a hybrid/ remote work model across people, processes, and technology. And, again, this has bigger implications for frontline workers because they are less likely to feel well-connected to the wider organization or less likely to have access to the technology resources they need.

Organizations are serious about future-proofing EX. Seventy percent of survey respondents said EX plans must include adaptive and flexible technologies that support the new normal. To that end, organizations are committing budget to improve EX across people, processes, and technology. Many of their plans for frontline workers will help bridge the gap in their employee experiences by ensuring effective communication, recognizing value in customer-engagement activities, and implementing the tech infrastructure they need for hybrid/flexible work.

Today's Remote Work Policies Are Reactive And Neglect Frontline Workers

The recent global disruptions have created the conditions for a business reset. The lockdowns unleashed opportunities for businesses to create increasingly flexible and diverse workforces. The traditional office setup is giving way to a hybrid workforce, and a broad set of tools is supporting this more dynamic workforce.

The unexpected onset of the pandemic hurled organizations into urgent business continuity planning, but some were more agile than others. Our study found that the pandemic:

- **Caught firms by surprise.** Every company must be prepared for all of its knowledge workers to work remotely on very short notice, and those workers need to be able to work effectively and safely. Resilient companies identify and mitigate risk, invest in business-continuity planning, have flexible crisis and incident response capabilities in place, and design business and technology systems for dependability. Only 32% of surveyed HR leaders said their organization was prepared to transition to hybrid/remote work, which means two-thirds of the respondents' organizations reactively scrambled to piece together haphazard models for remote work (see Figure 1).

- **Forced firms to reshape their hybrid/remote work strategies.** Seventy-five percent of surveyed HR leaders said the pandemic forced their organization to reevaluate strategies when managing mixed frontline and remote/desk-based teams. But actions are better than intention, and only about half of the respondents said their company has: 1) the structure to be flexible to easily and quickly absorb unexpected and highly disruptive events; 2) the technology resources

An anywhere-work strategy recognizes that employee engagement leads to better customer outcomes, and it works from there to provide technological, cultural, and leadership resources to support work from any location.

Figure 1

"How prepared was your organization to transition to remote/hybrid work during the pandemic?"
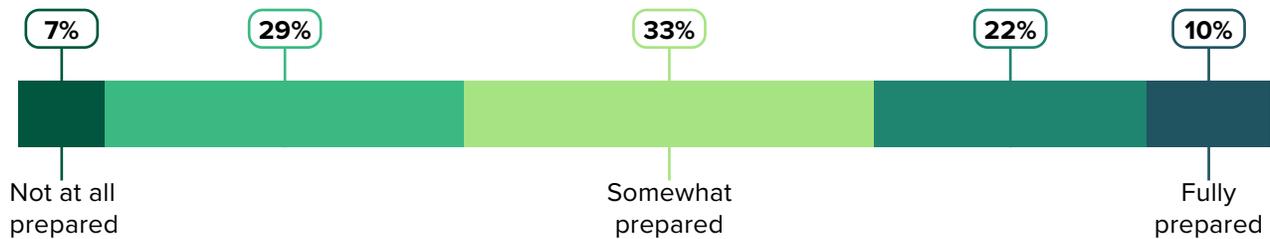
7%	29%	33%	22%	10%

Not at all prepared · Somewhat prepared · Fully prepared

Base: 164 HR leaders responsible for employee experience at global firms with hybrid/remote workplace models or plans to implement one
Note: Percentages may not total 100 because of rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of Fujitsu, October 2021

to allow people to work from home as necessary; and 3) the technology architecture to quickly and efficiently support major changes to business strategies or major process changes. These low figures reflect that firms have not made significant progress in changing their strategies, and they also don't bode well for resiliency planning.

- **Shaped frontline workers' expectations of the workplace.** According to Forrester research from 2019, 45% of frontline workers had enough flexibility to decide where they wanted to work before the pandemic.[1] But Forrester research from 2021 shows that frontline workers: 1) now expect increased flexibility because they prefer to work from home (65%); 2) hope to work from home more after the crisis (70%); and 3) expect their organization to allow more employees to work from home now than it did before the pandemic (69%).[2] This is not to say frontline workers will turn into desk-based workers, but rather that they can complete aspects of their job (e.g., scheduling, training, entering customer and project-related data into ERP or CRM systems) at home, and that their organizations must have the insfrastructure to support them.

The new normal is hybrid and flexible. Forrester research warns that organizational decision-makers need to stop longing for the old normal. Instead, they "must make a strategic shift away from remote work as a reactive tactic to 'anywhere work' as a proactive strategy, where they carefully determine who can work from where in order to deepen engagement and prepare their organizations for maximal post-pandemic

adaptivity."[3] This requires business leaders to maintain flexible remote working policies and the technology infrastructure to support it. Doing so will boost the employee experience by giving employees the flexibility to manage not only their work challenges but also their personal lives.[4]

FRONTLINE WORKERS ARE NOT A PRIORITY

More than ever, it is critical for HR and business leaders to provide human-centric workplaces for all employees. However, our survey revealed that there is a gap in how organizations manage the employee excperience for desk-based and frontline workers and that most focus their efforts on desk-based workers. In comparison, frontline workers:

- **Lacked important aspects of employee experience even before the pandemic.** Regarding people measures, 49% of respondents said their firm trained managers to better deal with remote, desk-based workers versus while only 35% said their firm did the same for frontline workers (see Figure 2). Without manager training, cross-company collaboration is likely to be very difficult. From a process perspective, respondents said their firm is 22% more likely to communicate to desk-based workers quickly and consistently. And respondents also said technology measures were included more often for desk-based workers than for frontline wrkers, particularly when enabling remote access to company resources, providing connectivity, and provisioning decives. This oversight means that organizations do not effectively use frontline workers for quality customer-engagement activities.

- **Lack equality in employee experiences.** Nearly 80% of surveyed HR leaders said the pandemic forced their organizations to devise new policies for hybrid/remote work for desk-based workers (see Figure 3). Only 60% said their organization did the same for frontline workers, despite them being at higher risk during the pandemic. Additionally, respondents said their organizations were 20% more likely to provide flexibility in work policies that improve the employee experience for desk-based workers, not considering the significance of employee experience for frontline workers to the same extent.

- **Are undervalued for their impact on business.** More than 70% of surveyed HR leaders said using their organization's hybrid/remote

work model for desk-based workers was a strategic decision to boost business resiliency, while 60% said their organization used a hybrid/ remote work model for frontline workers. This discrepancy highlights the lower value decision-makers place on frontline workers in comparison to desk-based workers.

Figure 2

"Which of the following measures were already part of your employee experience agenda before the pandemic?"

● Desk-based workers   ● Frontline workers

PEOPLE
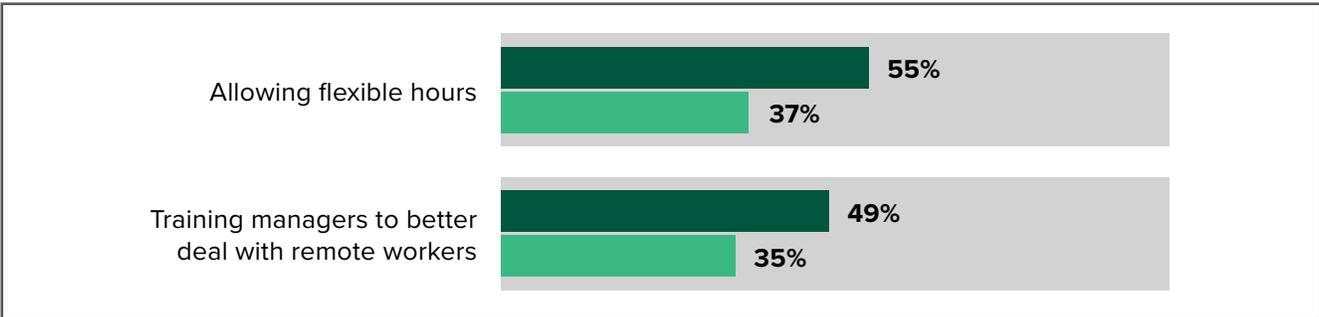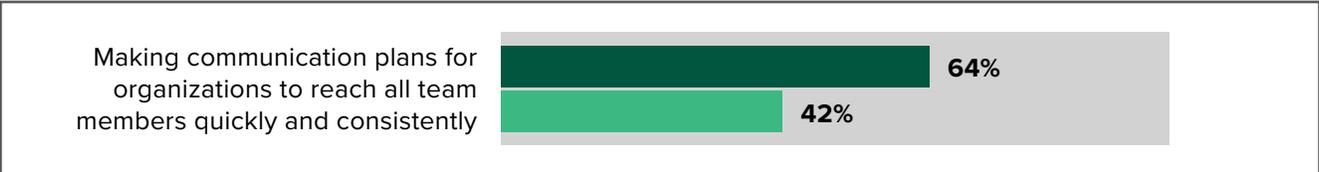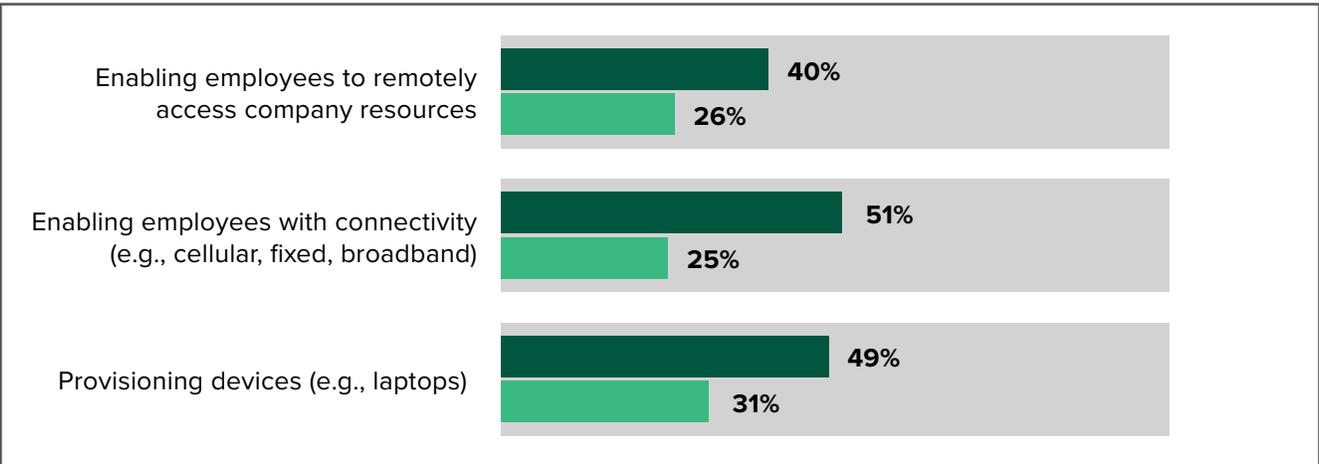
Allowing flexible hours
- Desk-based workers: **55%**
- Frontline workers: **37%**

Training managers to better deal with remote workers
- Desk-based workers: **49%**
- Frontline workers: **35%**

PROCESS

Making communication plans for organizations to reach all team members quickly and consistently
- Desk-based workers: **64%**
- Frontline workers: **42%**

TECHNOLOGY

Enabling employees to remotely access company resources
- Desk-based workers: **40%**
- Frontline workers: **26%**

Enabling employees with connectivity (e.g., cellular, fixed, broadband)
- Desk-based workers: **51%**
- Frontline workers: **25%**

Provisioning devices (e.g., laptops)
- Desk-based workers: **49%**
- Frontline workers: **31%**

Base: 164 HR leaders responsible for employee experience at global firms with hybrid/remote workplace models or plans to implement one
Source: A commissioned study conducted by Forrester Consulting on behalf of Fujitsu, October 2021

Figure 3

"To what extent do you agree with the following statements?"

● Desk-based workers   ● Frontline workers

The pandemic has forced us to devise a new policy for hybrid/remote work for desk-based workers. — **79%**

Our hybrid/remote work model for desk-based workers is a strategic decision to boost our business resiliency. — **71%**

Flexible hybrid/remote work policies improve the employee experience for desk-based workers. — **70%**

Flexible hybrid/remote work policies for desk-based workers are key to remaining competitive in the war for talent. — **67%**

The pandemic has forced us to devise a new policy for hybrid/remote work for frontline workers. — **60%**

Our hybrid/remote work model for frontline workers is a strategic decision to boost our business resiliency. — **61%**

Flexible hybrid/remote work policies improve the employee experience for frontline workers. — **52%**

Base: 164 HR leaders responsible for employee experience at global firms with hybrid/remote workplace models or plans to implement one
Note: Showing "Agree" and "Strongly agree."
Source: A commissioned study conducted by Forrester Consulting on behalf of Fujitsu, October 2021

What does this mean for businesses? For starters, the lack of parity not only hurts the employee experience for those on the front lines, but it also undermines the value in serving customers. Decision-makers at most traditional businesses now understand they need to deliver a service wrap around their organizations' product offerings to address rising customer expectations, so they've shifted their approaches from being focused on products to being focused on service and experience (see Figure 4).

Frontline workers already engage with customers, and they are the perfect solution to boosting customer engagement efforts to develop these value propositions. Therefore, this shift is fundamentally transforming the role of frontline workers as they grow into broader service and sales roles.

And frontline and desk-based workers are not integrated into homogenous collaborating environments. Many businesses fail to treat the pandemic as an opportunity to enhance systems for true cross-company collaboration.

To be successful, nearly 70% of surveyed HR leaders said that using a hybrid/remote work model requires comprehensive transformation efforts across their organizations.

Figure 4
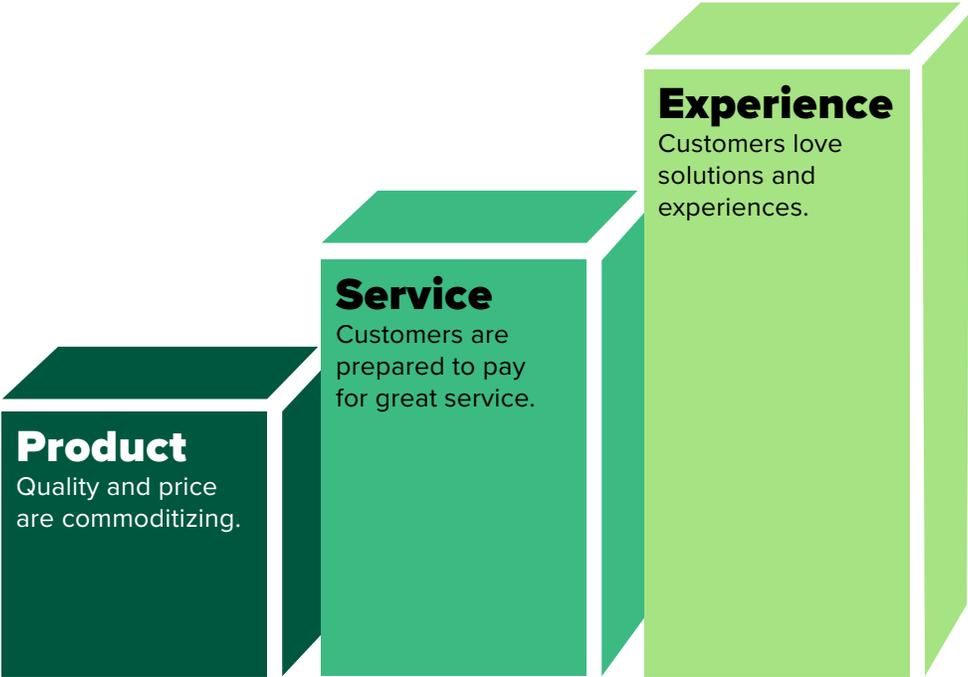
Experience
Customers love solutions and experiences.

Service
Customers are prepared to pay for great service.

Product
Quality and price are commoditizing.

Source: Forrester Research

Despite the common belief that using a hybrid/remote work model requires a comprehensive transformation, nearly all surveyed HR leaders said their firm experiences challenges with implementing this model across:

- **People.** More than half of respondents said their organization faces people challenges in implementing a hybrid/remote work model, whether it's addressing personal needs brought on by the pandemic (e.g., mental healthcare, childcare), developing manager and employee skills, strengthening company culture (virtually and through trust), ensuring collaboration across all workers, or handling turnover.

- **Process.** More than half of respondents said their organization struggles with its hybrid/remote work model from a process perspective. Issues include training employees to securely access company resources, effectively managing virtual teams, and navigating heterogeneous labor regulations across countries.

- **Technology.** About half of respondents said their organization faces issues with technology — primarily in ensuring digital security, providing sufficient IT support, and managing strict regulatory compliance that slows down the pace of technology improvements. They also lack the technology solutions or a flexible infrastructure that would allow for change.

Nearly all respondents said their firm experiences challenges in implementing a hybrid/remote work model across people, processes, and technology.
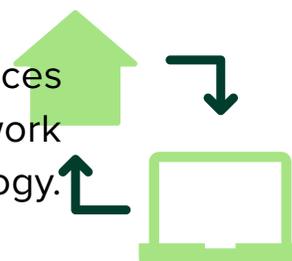
CURRENT REGULATIONS FOR REMOTE WORK AND MONITORING EMPLOYEES WILL BUILD TRUST

Half of surveyed HR leaders reported that strict regulatory compliance slows down the pace of technology improvements. However, these regulations are focused on improving remote work and monitoring

employees, and they are set to become much more complex in the post-pandemic world.

- **Across Europe, the regulatory landscape for work from home (WFH) is taking shape and diverging.** Spain and Greece have announced upcoming rules for WFH, France is revamping legislation from 2017 that grants employees the right to disconnect from work devices after their shifts, Luxembourg is planning to draft a law that recognizes a similar right, Germany is looking to implement measures to strengthen employees' rights and set specific WFH boundaries, and Ireland is debating a bill that would require employers to provide suitable home workstations and flat-rate payments to cover employees' costs. Businesses must monitor these new regulations, set policies that meet the requirements in each country, and tell employees in local markets about their new rights.

- **An employee who works remotely in a different country than their organization can be subject to different tax treatment.** For both employers and employees, there are tax and regulatory consequences of working abroad for an extended period. If national tax authorities consider an employee to be working from a permanent establishment in another country for more than half the year, both the employer and the employee would need to pay tax in the host country. For the employee, this means paying income tax in the host country. For the employer, it means ensuring that the relevant compliance steps are met and that the correct amount of profit is attributed to the employee. To meet these tax obligations, leading financial services companies have put in place a tracking mechanism to digitally monitor the locations from which staff members log into its systems.

- **Any staff monitoring activity must comply with General Data Protection Regulation (GDPR).** Tracking employees is a tricky task, and it can undermine trust and breach privacy regulations in many countries, especially the EU. Complying with GDPR when monitoring employee activities takes time for planning and governance.

Regulations on improving remote work and monitoring employees will become much more complex in the post-pandemic world.

The traditional office setup will give way to a hybrid setup. In this arrangement, employees rotate who will work from home while others work from the office. As a result, remote workers will no longer be second-class members of the workforce. This shift will also integrate frontline workers more deeply into the overall workforce. Accordingly, tech professionals need to work very closely with HR representatives to ensure that work policies, incentives schemes, and cultural transformations are aligned with technology strategies.

An organization's remote/flexible work challenges with people, processes, and technology have implications on employee satisfaction. While surveyed HR leaders think most employees are satisfied with their approach to remote/hybrid work, Forrester's research with frontline workers indicates that they are 10% less likely to have access to the technology resources they need to work from home than desk-based workers do. In addition, HR leaders said they believe their organizations underdelivered on other aspects of the employee experience for frontline workers and made them feel less connected to the wider organization (53%) in comparison to desk-based workers (33%). Firms that increase the percentage of frontline workers who are satisfied with their work experiences and technology at work will have an advantage over laggards.

The challenges that organizations are experiencing are perhaps a reflection that decision-makers hope to return to pre-pandemic work patterns. In many cases, their organization's remote work policies only meet short-term challenges they view as exceptions post-pandemic.

HR leaders said frontline workers are less likely to have access to the technology resources they need to work from home than desk-based workers.

Forrester believes that organizations that prioritize employee engagement will deliver customer-obsessed outcomes more successfully.[5] Having an anywhere-work approach is a prerequisite to engaging workers and ensuring these outcomes, but it also means organizations must enhance their employee experiences with the right processes, technologies, and cultures. To that end, 70% of surveyed HR leaders said EX plans must include adaptive and flexible technologies that support the new normal.

FIRMS' PRIORITIES ARE REFLECTIVE OF FUTURE-PROOFING EX

Our findings show that decision-makers are serious about improving their firms' existing remote/flexible work policies. Their priorities for the next 12 months are focused on improving employee experience for both frontline and desk-based workers across:

- **People.** About 80% of surveyed HR leaders said their firm's top three people priorities for frontilne workers are retaining talent, training managers to better handle remote work, and promoting well-being (including providing support for mental health). A similar number of respondents said their firm's top priorities for desk-based workers are enabling WFH policies; implementing cross-training, reskilling, and upskilling programs; and implementing talent-retention initiatives. These priorities reflect the challenges firms face today, particularly for frontline workers.

- **Process.** For frontline workers, respondents said their firms' top priorities are establishing health and safety policies (84%), updating

Many of the priorities for frontline workers indicate gaps in their EX around effective communication, recognizing their value in customer engagement activities, and implementing the tech infrastructure they need for hybrid/flexible work.

employees on operational strategies (81%), and improving work with agility and collboration (75%). These priorities indicate that decision-makers are actively trying to close the gap on some of the current issues with this group (e.g., providing effective communication, recognizing the value of employees in quality customer engagement activities). For desk-based workers, respondents said their firms are making it a high or critical priority to provide updates on operational strategies (84%), to optimize work through agility and collaboration (78%), to put in place communications plans to reach all employees quickly (72%), and to automate repetitive tasks (67%). Because robots and robotic process automation (RPA) take on mundane and repetitive tasks, workers can focus on tasks that add more value and move into higher-paying positions.

- **Technology.** In addition to prioritizing the implementation of productivity apps and security tools, firms are also prioritizing the implemention of digital messaging or dedicated channels for frontline workers (81%) and setting up flexible/adaptive technology infrastructure (75%). Both of these inititatives link to firms' efforts to better connect frontline workers to the rest of the organization and to have the necessary tech infrastructure in place for employees to do their jobs regardless of location. More than 80% of respondents said the top three technology priorities for desk-based workers are focused on providing them with the security tools, devices, and productivity applications they need to do their jobs.

FIRMS' INVESTMENT PLANS REFLECT FUTURE-PROOFING EX

Around 90% of surveyed HR leaders said they are likely to advocate for additional technology for all workers to help prepare for any potential future disruptions (see Figure 5). While it's critical for HR to be on-board with this, HR leaders alone don't have the power to change the situation. They must involve leaders from other departments to make conscious decisions to support hybrid work.

Whether their firm is planning to invest in the next 12 months or expanding its current investment, 62% of respondents said their firm plans to allocate budget in many areas to improve EX with hybrid/remote work for desk-based workers — primarily in cloud-based applications, improved privacy

and security capabilities, and virtual collaboration tools like smart forms or whiteboarding sessions (see Figure 6). HR leaders also said their firms plan to invest in many areas to improve EX with hybrid/remote work for frontline workers, primarily in full use of cloud-based applications (70%), IT infrastructure or equipment tailored for frontline workers (60%), and augmented reality tools (60%) (see Figure 7).

FUTURE-PROOFING EX WILL PAY OFF

Surveyed HR leaders said future-proofing EX with technology investment has led to benefits and will continue to bring benefits during the next two years across:

- **People.** As a result of using a technology solution for hybrid/remote work, 60% of respondents said their firm experiences people benefits around improved company culture, retaining/attracting talent, and having better insights into developing employee skills. About half expect more focus on digital interactions and employee autonomy during the next two years.

- **Process.** About 60% of respondents said using technology for hybrid/ remote work enabled their firm to achieve process benefits with better productivity, cross training, and health and safety measures. About half expect better collaboration between HR and IT teams and increased engagement with all workers during the next two years.

- **Technology.** From a technology perspective, 54% of respondents said their firms see benefits around better employee engagement for desk-based workers, and 47% said their firm sees benefits for frontline workers. Forty-one percent also said their firm now pays less for office space. About half expect bigger-picture benefits around improving their ability to launch new products, collaborating seamlessly across work tasks, and improving resiliency from new technologies during the next two years.

Figure 5

"How likely would you be to advocate for additional technology for desk-based workers at work/home to help prepare for any additional potential future disruption like the current COVID-19 situation?"

Not at all likely		Neutral		Very likely
0%	2%	12%	26%	60%
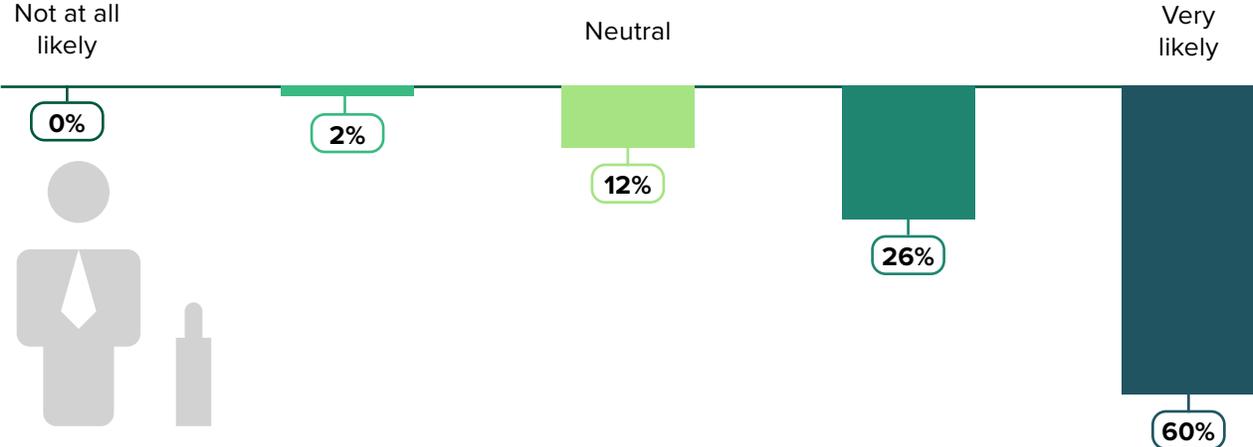
"How likely would you be to advocate for additional technology for frontline workers to help prepare for any additional potential future disruption like the current COVID-19 situation?"

Not at all likely		Neutral		Very likely
0%	0%	8%	21%	71%
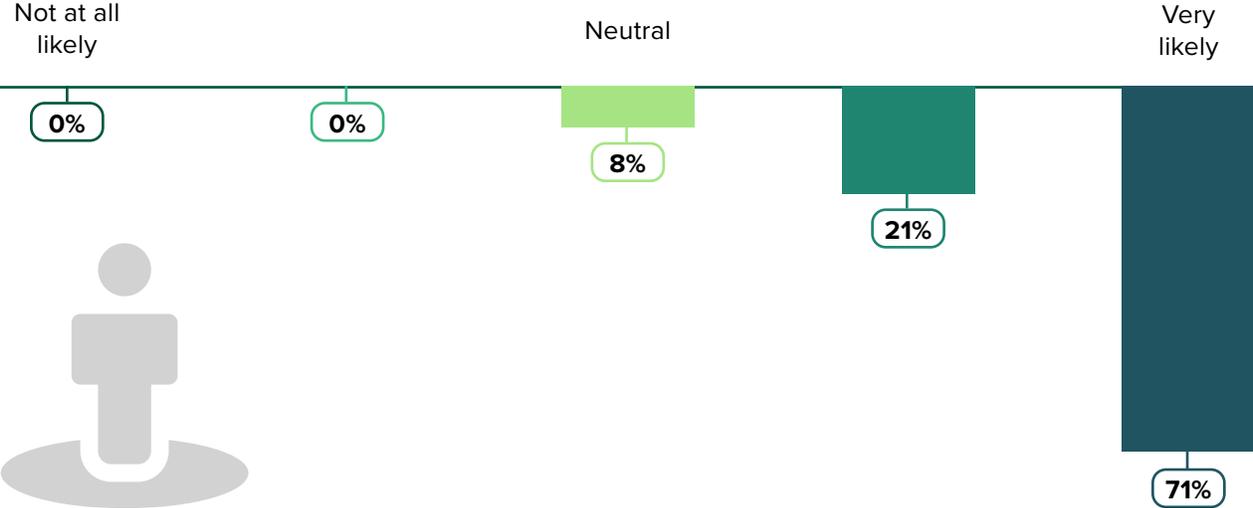
Base: 164 HR leaders responsible for employee experience at global firms with hybrid/remote workplace models or plans to implement one
Source: A commissioned study conducted by Forrester Consulting on behalf of Fujitsu, October 2021

Figure 6

"What are your company's plans to invest in the following areas to improve the employee experience for desk-based workers with a hybrid/remote work model?"

● Planning to invest in the next 12 months   ● Expanding or upgrading investment

Area	Planning to invest in the next 12 months	Expanding or upgrading investment
Full use of cloud-based applications	30%	32%
Improved privacy and security capabilities	16%	46%
Smart forms and whiteboarding for virtual collaboration	19%	43%
Digital experience technologies (e.g., web, mobile, chat, voice assistants, intelligent agents)	19%	41%
Data and analytics technologies	21%	38%
Augmented reality tools for employees	29%	29%
Workforce well-being and mental health support	20%	35%
Mobile and tablet strategies	21%	34%
Zero Trust approach to cybersecurity	24%	29%
Automated features to support the intelligent workspace	30%	22%
Design of modern office workspaces	30%	22%
Self-service deployment of remote-working tools	18%	32%
Customer experience co-innovation	26%	24%
Remote workplace support facilities	15%	34%
Automation to augment our human workforce	34%	15%
Smart connected products or connected assets as part of internet-of-things (IoT) solutions	24%	23%

Base: 164 HR leaders responsible for employee experience at global firms with hybrid/remote workplace models or plans to implement one
Source: A commissioned study conducted by Forrester Consulting on behalf of Fujitsu, October 2021

Figure 7

"What are your company's plans to invest in the following areas to improve the employee experience for frontline workers with a hybrid/remote work model?"

● Planning to invest in the next 12 months   ● Expanding or upgrading investment

	Planning to invest in the next 12 months	Expanding or upgrading investment
Full use of cloud-based applications	32%	38%
IT infrastructures/equipment tailored for frontline workers	27%	33%
Augmented reality tools for employees	38%	22%
Zero Trust approach to cybersecurity	36%	23%
Digital experience technologies (e.g., web, mobile, chat, voice assistants, intelligent agents)	27%	30%
Safe working for mobile field and service workers	27%	30%
Self-service deployment of remote-working tools	20%	37%
Mobile and tablet strategies	28%	29%
Automation to augment your human workforce	27%	30%
Customer experience co-innovation	29%	27%
Improved privacy and security capabilities	28%	27%
Workforce well-being and mental health support	21%	34%
Smart connected products or connected assets as part of internet of things (IoT) solutions	25%	29%
Automated features to support the intelligent workspace	26%	27%
Data and analytics technologies	26%	26%
Smart forms and white boarding for virtual collaboration	21%	28%
Remote workplace support facilities	17%	29%

Base: 164 HR leaders responsible for employee experience at global firms with hybrid/remote workplace models or plans to implement one

Source: A commissioned study conducted by Forrester Consulting on behalf of Fujitsu, October 2021

Key Recommendations

Organizations must not wait until the end of the pandemic to determine the future of their work models. Surveyed HR leaders expect to see many of the same people challenges around ensuring communication/collaboration across employees, improving trust between employees and management, and providing better management for hybrid/remote work during the next two years. They also expect many of the existing process and tech challenges (primarily around security and compliance) to remain. Making anywhere-work strategies a dynamic part of the business gives firms the flexibility they need to handle new employee expectations and to ensure business continuity in the future.

Forrester's in-depth survey of HR leaders responsible for employee experience at their firm yielded important recommendations about using a hybrid/remote workplace model:

Bridge the gap between desk-based workers and frontline workers to enable better communication and collaboration.

Having the capability for all stakeholders to collaborate is important for any digital business. Frontline workers need to work just as productively as office workers do. It's critical to connect colleagues regardless of their location or division. For instance, dynamic task scheduling is a big benefit of effective collaboration and effective workflow. Some solutions have been around for many years in some form as sales or field-force automation solutions. But today it's easier to integrate these workflows into cloud-based processes that link to several other systems and to those of partner organizations through open APIs and open interfaces.

Devise metrics to measure frontline worker activities that reflect customer pain points and business objectives.

Technology leaders need to adopt business-value metrics, and those metrics need to reflect business objectives. For instance, a service-engineering firm would likely track mean-time-to-repair as a key business-value metric. So, business and tech leaders must collaborate closely when defining these metrics. To increase the understanding of business metrics, your organization will need design-thinking training for both business and tech leaders. And end-user experience management (EUEM) will also play
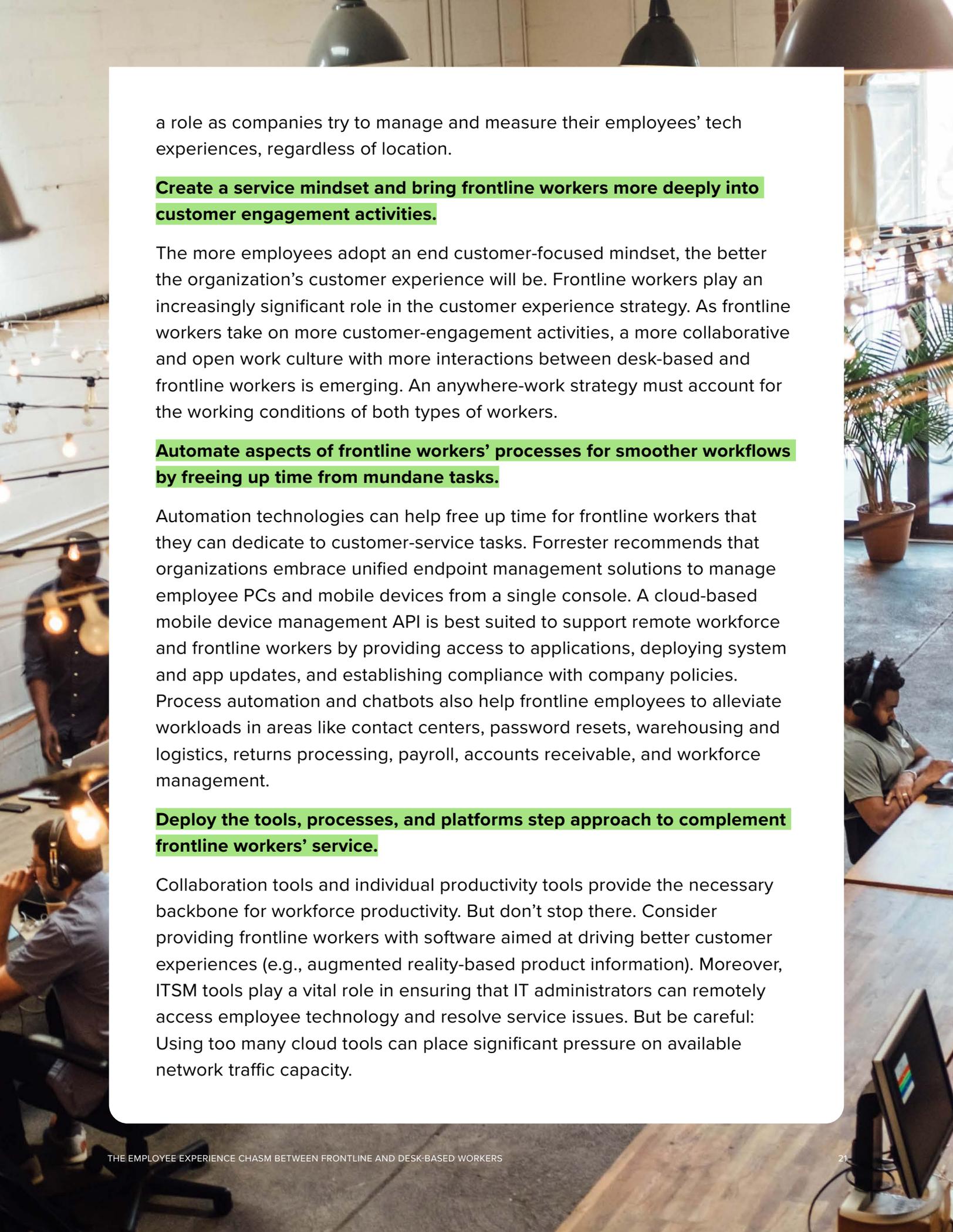
a role as companies try to manage and measure their employees' tech experiences, regardless of location.

Create a service mindset and bring frontline workers more deeply into customer engagement activities.

The more employees adopt an end customer-focused mindset, the better the organization's customer experience will be. Frontline workers play an increasingly significant role in the customer experience strategy. As frontline workers take on more customer-engagement activities, a more collaborative and open work culture with more interactions between desk-based and frontline workers is emerging. An anywhere-work strategy must account for the working conditions of both types of workers.

Automate aspects of frontline workers' processes for smoother workflows by freeing up time from mundane tasks.

Automation technologies can help free up time for frontline workers that they can dedicate to customer-service tasks. Forrester recommends that organizations embrace unified endpoint management solutions to manage employee PCs and mobile devices from a single console. A cloud-based mobile device management API is best suited to support remote workforce and frontline workers by providing access to applications, deploying system and app updates, and establishing compliance with company policies. Process automation and chatbots also help frontline employees to alleviate workloads in areas like contact centers, password resets, warehousing and logistics, returns processing, payroll, accounts receivable, and workforce management.

Deploy the tools, processes, and platforms step approach to complement frontline workers' service.

Collaboration tools and individual productivity tools provide the necessary backbone for workforce productivity. But don't stop there. Consider providing frontline workers with software aimed at driving better customer experiences (e.g., augmented reality-based product information). Moreover, ITSM tools play a vital role in ensuring that IT administrators can remotely access employee technology and resolve service issues. But be careful: Using too many cloud tools can place significant pressure on available network traffic capacity.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 164 HR leaders in Australia, France, Germany, Japan, Netherlands, New Zealand, the UK, and the US to evaluate the state of hybrid/remote work for desk-based and frontline workers at organizations that already have established a hybrid/remote workplace model or plan to establish one. Survey participants included decision-makers with responsibilities related to their organizations' employee experience strategies. Questions provided to the participants asked about people, process, and technology practices their organizations have implemented as part of their hybrid/remote work models, differences in policies for desk-based and frontline workers, challenges the organizations experience with providing good employee experiences, and areas of focus/investment to improve current models. Respondents were offered incentives as a thank you for time spent on the survey. The study began and was completed in October 2021.

Appendix B: Demographics

COUNTRY	
United States	**34%**
Japan	**17%**
United Kingdom	**12%**
Australia	**12%**
France	**8%**
Germany	**7%**
The Netherlands	**6%**
New Zealand	**5%**

INDUSTRY	
Retail	**20%**
Transportation and logistics	**19%**
Financial services and/or insurance	**18%**
Manufacturing and materials	**10%**
Healthcare	**8%**
Consumer product goods and/or manufacturing	**7%**
Travel and hospitality	**6%**
Government	**6%**
Education and/or nonprofits	**6%**

REGION	
North America	**34%**
EMEA	**33%**
APAC	**34%**

COMPANY SIZE	
2,000 to 9,999 employees	**83%**
10,000 employees or more	**17%**

DEPARTMENT	
HR	**100%**

TITLE	
Director (manage a team of managers and high-level contributors)	**62%**
Vice president (in charge of one/ several large departments)	**34%**
C-level executive (e.g., CEO, CMO)	**5%**

LEVEL OF RESPONSIBILITY RELATED TO EMPLOYEE EXPERIENCE STRATEGY

I influence decisions related to the employee experience.	**15%**
I am the final decision-maker for the employee experience.	**23%**
I am part of a team making decisions for the employee experience.	**63%**

COMPANY'S PLANS TO IMPLEMENT HYBRID/REMOTE WORKPLACE TECHNOLOGY SOLUTIONS

Planning to implement in the next 12 months	**38%**
Expanding or upgrading implementation	**24%**
Implemented, not expanding/upgrading	**24%**
Interested but no plans to implement	**11%**
Decreasing or removing	**2%**
Not interested	**0%**

COMPANY'S PLANS TO ESTABLISH A HYBRID/REMOTE WORKPLACE MODEL

We are post-transformation; our hybrid/remote workplace model is fully embedded into our business.	**32%**
We are currently establishing a hybrid/remote workplace model.	**24%**
We plan to establish a hybrid/remote workplace model in the next 12 to 24 months.	**23%**
We plan to establish a hybrid/remote workplace model within the next 12 months.	**21%**

Note: Percentages may not total 100 because of rounding.

Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"Pick From Three Types of Anywhere-Work Strategy," Forrester Research, Inc., November 18, 2020

Appendix D: Endnotes

[1] Source: Forrester Analytics Global Business Technographics® Workforce Benchmark Survey, 2019.
[2] Source: Forrester Analytics Business Technographics® Workforce Benchmark Survey, 2021.
[3] Source: "Use The Lessons Of 2020 To Create Your Anywhere-Work Strategy," Forrester Research, Inc., November 17, 2020.
[4] Source: "A European Perspective On The Future Of Work For 2021," Forrester Research, Inc., April 14, 2021.
[5] Source: "Use The Lessons Of 2020 To Create Your Anywhere-Work Strategy," Forrester Research, Inc., November 17, 2020.