FORRESTER®

Understanding Modernized PCs' Role In Optimizing Hybrid Work Environments: A Spotlight On IT And Security

IT-Focused Results From The July 2021 Thought Leadership Paper, "Understanding Modernized PCs' Role In Optimizing Hybrid Work Environments"

Executive Summary

The COVID-19 pandemic fundamentally changed the manner in which people work. The concept of a structured, centralized, 9-to-5 job has given way to a more flexible and employee-centric approach that spans the office, home, and alternative remote work locations. While these dispersed arrangements yield benefits to employees and even companies (through realized savings on expensive leases and related utilities), they also present significant challenges. Many PCs (including laptops and desktops) are not optimized for this hybrid work setup. In fact, these new work scenarios especially complicate the jobs of IT leaders who are responsible for providing employees with the right PCs and software to work in their new environments and — most importantly — to work securely.

In June 2021, Microsoft commissioned Forrester Consulting to evaluate device, infrastructure, and security requirements for businesses in a post-pandemic, hybrid-work environment. Forrester conducted an online survey with 1,733 business decision-makers in IT, HR, and line-of-business roles across 11 different countries to explore this topic. This spotlight focuses on the 577 research respondents in IT-specific roles, and it highlights the importance that security plays in all PC modernization decisions.

While both business and IT leaders recognize that improved devices are needed to support these hybrid-work environments and they are committed to making greater investments in PCs to meet that need, IT leaders place even greater value on security when considering their organizations' hybrid-work strategies.

Key Findings ⟶

Key Findings

IT leaders are prioritizing security.
It's been more than a year since the pandemic began, and many companies have embraced the new normal of hybrid work. IT leaders have reevaluated their priorities and they rank security as their number one PC priority.

Deployed devices are not equipped for hybrid work.
Two-thirds of IT leaders believe there needs to be significant to moderate improvements in device security to support hybrid work. Moreover, only one-third feel their organization's devices are secure and protected with best-in-class technology.

IT leaders are improving PCs with employees in mind.
Employees are a company's greatest asset. With the right security in place, they can work confidently in hybrid work environments. IT leaders plan to improve PC security for remote connectivity, choosing newer hardware and identity access management solutions. In return, respondents expect increased productivity, innovation, and utilization of existing technology solutions.

IT Priorities Have Evolved With Hybrid Work

The pandemic forever left its mark on workplaces. IT leaders expect that more than 53% of their organizations' workforces will continue to operate in remote or hybrid work scenarios (i.e., a mix of in-office and remote work). This is radically different from how most companies operated prior to the pandemic, and businesses' priorities have changed. In particular, today's IT leaders are focused on ensuring employees' devices are properly secure and amenable to new working situations.

- **Seamless hybrid work experience.** As IT leaders enter hybrid work environments, they are focused on employee productivity and security. Making hybrid work easier through an increased availability of computer peripherals and by ensuring data access and security across the business are respondents' top employee-related priorities (see Figure 1).

- **IT leaders prioritize security more than other business leaders do.** IT companies are starting to reevaluate their priorities given new work configurations, and security is a top priority. Forty-four percent of respondents say that ensuring proper data access and security across all business systems (including PCs) is a top employee-related priority (see Figure 1).
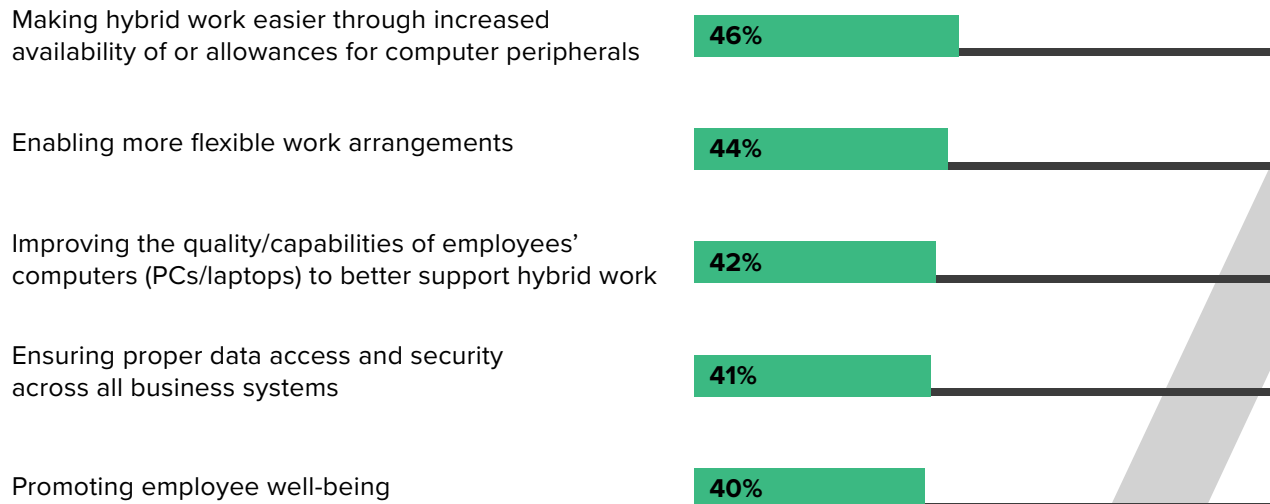
  This is not a reactionary phase. Nearly one in four IT leaders place security as their top priority in the next two years, and 50% put it as a top-three priority. Only 37% of line-of-business workers and 35% of HR employees consider it to be a top-three priority.

- **Employees demand better security.** Half of IT leaders (51%) report that improved security and data management is a top request from employees as they embrace hybrid work environments. That said, organizations must balance security improvements with employee experience (EX) to make sure that security doesn't stand in the way of getting the job done.

Figure 1

"Which of the following best describes your organization's top employee-related priorities?"

(Select top 3)

Making hybrid work easier through increased
availability of or allowances for computer peripherals — **46%**

Enabling more flexible work arrangements — **44%**

Improving the quality/capabilities of employees'
computers (PCs/laptops) to better support hybrid work — **42%**

Ensuring proper data access and security
across all business systems — **41%**

Promoting employee well-being — **40%**

Base: 1,733 business and technology decision-makers responsible for employee equipment, software, and post-pandemic back-to-work plans
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2021

Current PCs Are Not Equipped For Hybrid Work

Hybrid work models introduce significant changes to the workforce that make the reliability of PCs more critical than ever. IT leaders don't believe their organizations' current PCs are equipped to support this reality, and they believe the deficiency of the currently deployed devices as their top challenge.

- **Current devices don't enable hybrid work.** IT leaders are realizing their organizations' currently deployed devices are not set up to support hybrid work. Respondents indicate their organizations' current PCs lack proper security and have short battery lives and slow processing speeds. These features are critical to employee productivity in a remote or hybrid work environment that has less access to IT support.

- **Deployed devices need stronger security.** Respondents say a lack of security is the top challenge employees face with their PCs. The hybrid work environment has exacerbated these challenges as two-thirds of respondents see the need for significant to moderate improvements in device security to support hybrid work. Only 34% of respondents believe their organization's devices are secure and protected with best-in-class technology.

- **The cost of making improvements is high.** IT leaders identify cost as one of the top three obstacles to supporting a hybrid workplace. The high cost associated with implementing new software and hardware is a real concern to companies as they work to transform their workplaces. Leaders understand improvements need to be made, but they are struggling to find the budget.

Figure 2

"What are the top barriers that are inhibiting your company's ability to execute on its ideal employee device strategy?"

(Select top 3 ranked)
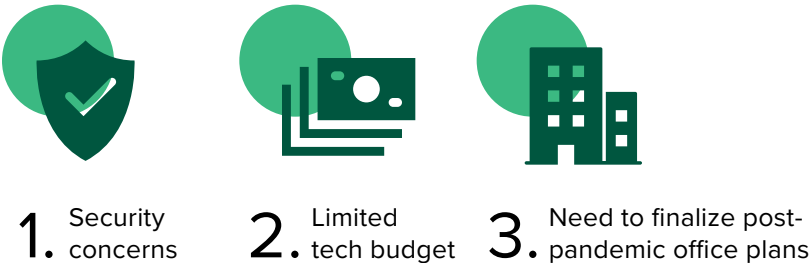
1. Security concerns
2. Limited tech budget
3. Need to finalize post-pandemic office plans

Base: 1,733 business and technology decision-makers responsible for employee equipment, software, and post-pandemic back-to-work plans
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2021

PCs enable a company's greatest asset: its employees. As companies adjust to hybrid work, it is critical to ensure their PCs are secure and set up to enable employee productivity. IT leaders understand that if employees have the right peripherals and devices in place, they can operate as confidently, effectively, and securely at home as they do in the office. Respondents say their organizations are investing in PCs not only to protect what's critical, but also to maximize employee productivity.
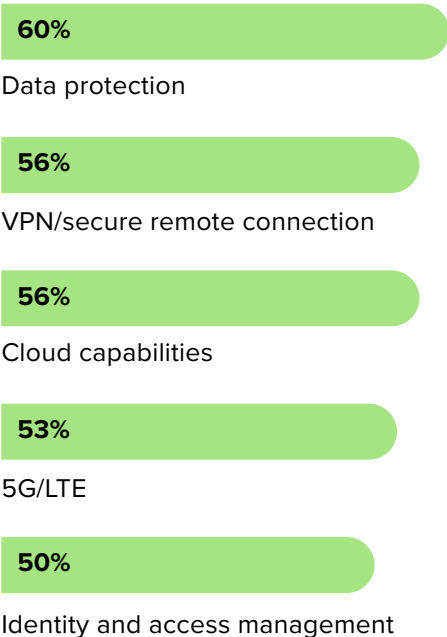
- **IT leaders are planning to increase security.** Fifty-four percent of IT decision-makers say improving device security for remote connectivity is the necessary next step in employee device planning. Choosing newer hardware, implementing identity access management solutions, and taking a Zero Trust posture can help secure both endpoints and the larger enterprise network.

  Respondents believe the top security-focused attributes are data protection (60%), VPN/secure remote connection (56%), and identity and access management (50%) (see Figure 3).

- **There is a direct connection between improving PCs and employee productivity.** IT leaders expect improvements in PCs to lead to more than just security. Respondents believe PC improvements will also improve employee productivity (58%) and innovation (46%) and ensure better utilization of existing technology solutions (43%).

Figure 3

"What technology or processes are now more critical than ever to support a hybrid work environment (beyond the device itself)?"

(Rank up to 5)

60%
Data protection

56%
VPN/secure remote connection

56%
Cloud capabilities

53%
5G/LTE

50%
Identity and access management

Base: 1,733 business and technology decision-makers responsible for employee equipment, software, and post-pandemic back-to-work plans
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, June 2021

Key Recommendations

Forrester believes that 70% of organizations will embrace more flexible and remote work styles as the pandemic recedes.[1] An office + anywhere hybrid workplace will emerge in which employees spend time in the office a few days a week and also work whenever from wherever they choose several days a week. As a result, the employee journey will evolve, and this requires PCs and applications that are flexible, secure, and excellent at switching contexts — from home offices to corporate offices to hotel rooms.

Forrester's in-depth survey regarding the PC needs and challenges that business and technology decision-makers face regarding hybrid work yielded several important recommendations:

Make security a central priority for the world of hybrid work.
More than half of the decision-makers in our survey (51%) say improving device security for remote connectivity is already a work-in-progress, and security is the top priority for PCs during the next one to two years. Modern endpoints with modern management can drive a Zero Trust security posture that reduces risk. Organizations should deploy a cloud-based management approach that reaches PCs wherever they are being used to lower downtime and hasten updates. Smart leaders will choose newer devices that offer features like biometric authentication to further strengthen your organization's security posture.

Place EX at the center of your thinking.
Today, 87% of IT leaders have either a group goal or an individual performance goal related to employee experience.[2] EX (which measures how engaged workers are from their interactions in their employer's environment), can rise or fall based on the quality of the technology available to them. Understand that employees' needs will be changing along with the nature of work, and place those needs at the center of your back-office and PC strategies. Replacing older devices with new ones, expanding the use of cloud software and management, and shortening device refresh cycles are easy ways to improve EX. High EX is the key driver of employee productivity, so investments in it will yield the highest possible returns.

Map employees' new journeys in the hybrid world.

For IT leaders to promote both security and EX, they must deeply understand employees' new daily journeys and the moments that matter every day. Employees will not just be moving from the living room to the den to take a videoconference, they'll be checking in and out of a flex desk at the office and — and working on planes, in cafes, and at customer sites when it's safe. Interview and survey employees in different roles to create role-specific journey maps.

Choose PCs that map to employee journeys and that drive EX.

IT leaders are in the best position to match critical business moments with PC hardware features. For example: Built-in, high-quality webcams will become table stakes for many organizations. A hybrid worker moving from a flex desk to a conference room might require a longer battery life, and an employee who travels would almost certainly benefit from a 5G/LTE network. Consider this journey mapping exercise by role, because a salesperson and a software engineer might have different needs that can be accomplished with the same PC or by equipping them with role-specific devices.

Articulate a business case for a modern technology stack.

Great PC experiences start with PC hardware, but they don't end there. IT must have cloud-enabled, modern management tools to help equip employees with great EX. IT stacks that continue beyond IT management to productivity applications and web applications that can make employees' productivity soar wherever they are.

Reconsider your organization's approach to device refresh.

Corporate policies around PC refreshes vary; some organizations refresh every two years and others wait as long as seven. Many knowledge workers will require up-to-date technology to give them the features and innovations they need, the speed to accomplish work tasks, and the stability to require little support while doing so. Faster refresh cycles can also benefit your company's business continuity and resilience strategies while simultaneously improving its endpoint security posture.

Appendix A: Methodology

In this study, Forrester conducted an online survey with 1,733 business decision-makers in IT, HR, and line-of-business roles across 11 countries to explore the topic of hybrid work and PCs. Interviewees came from countries including the US, the UK, Canada, France, Germany, Spain, the Netherlands, Sweden, Italy, Japan, and Australia. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in May 2021 and was completed in June 2021.

This spotlight focuses on the results from the 577 IT decision-makers.

To read the full results of this study, please refer to the Thought Leadership Paper commissioned by Microsoft titled, "Understanding Modernized PCs' Role In Optimizing Hybrid Work Environments"

Project Director:
Chris Taylor, Principal Market Impact Consultant

Contributing Research:
Forrester's Future Of Work research group

Appendix B: Demographics

COUNTRY	
Australia	**9%**
Italy	**9%**
Japan	**9%**
Canada	**9%**
France	**9%**
Germany	**9%**
The Netherlands	**9%**
Spain	**9%**
Sweden	**9%**
UK	**10%**
US	**9%**

EMPLOYEES	
500 to 999	**21%**
1,000 to 4,999	**44%**
5,000 to 19,000	**21%**
20,000 or more	**14%**

INDUSTRY	
Technology (23%)	**23%**
Manufacturing (11%)	**11%**
Financial services (11%)	**11%**
Retail (9%)	**9%**
Other (45%)	**45%**

TITLE	
C-level executive	**41%**
VP	**20%**
Director	**39%**

IT ROLES	
Operations (50%)	**50%**
Security (42%)	**42%**
Risk and compliance (8%)	**8%**

Appendix C: Endnotes

[1] Source: "Don't Miss Your Anywhere-Work Opportunity," Forrester Research, Inc., March 29, 2021.
[2] Source: Forrester Analytics Business Technographics® Infrastructure Survey, 2020.

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.