



Transforming the digital employee experience

2020 digital workplace trends

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INTRODUCTION



In 2020 a key strategic focus for many businesses and organisations will be to successfully roll-out an effective digital workplace, increasing user adoption and driving an overall excellent digital employee experience.

Organisations now recognise the need to craft a consistent, user-centred and personalized experience of workplace technology that helps employees with their working day while also meeting wider organisational objectives, especially around efficiency and user-engagement.

The potential provided by tools like Microsoft Teams and solutions that support a more compelling experience overall, present significant opportunities for those leading digital workplace initiatives for them to make a real difference.

But the complexity and noise of fragmented digital landscapes and the overwhelming number of tools and applications in use means there are challenges. Meanwhile highly diverse workforces with different needs and preferences now expect an experience that is relevant to them.

This guide details our top ten trends for the digital workplace for 2020. It aims to provide digital workplace leaders with recommendations and talking points to help them plan for 2020 and be in a better position to seize the opportunities and navigate the challenges. The insights are built on our experience working with more than one thousand B2B customers.

Whether you're managing a mature digital workplace or want to open conversations with stakeholders, we aim that you find it thought provoking and useful. We've also included a more detailed checklist at the end of this report with specific questions to consider.

We believe 2020 is going to be a pivotal and exciting year for the digital workplace and the teams behind them. It will be the year when we witness the rebirth of the intranet as the centre of the intelligent digital workplace, driving business value.

It's time to strap yourself in, get ready, and enjoy the ride!

Karl Redenbach,
CEO LiveTiles, December 2019

WHAT DO WE MEAN BY 'DIGITAL WORKPLACE' AND 'DIGITAL EMPLOYEE EXPERIENCE'?

'Digital workplace' and 'digital employee experience' are both commonly used terms, but there is no exact consensus on their specific meaning.

Definitions for 'digital workplace' vary between all the technology provided by a company for its employees to an intranet that has a lot of integrations with other systems. However, we agree with leading independent intranet expert Sam Marshall who says **"You can't buy a digital workplace,"** because it's not a product or a destination.

Instead, we see the digital workplace as a unified, consistent and co-ordinated experience of workplace technology. In practice this usually allows for numerous integrations between disparate applications. It's also a more holistic and strategic way of thinking about workplace technology that recognises its full value and distinguishes it as a key enabler of digital transformation.

Similarly, the "digital employee experience (DEX)" is a concept, and even a mindset. James Robertson from Step Two (a global powerhouse in digital workplace transformation) defines "DEX" as the **"sum total of digital interactions within the work environment"**, a definition that encompasses more than just the user experience of the digital workplace, but also how tools are used by staff, the interactions with colleagues and potentially even the content they might access. We also subscribe to this wide-screen view of DEX as the overall experience of the digital workplace.



08

MEGA-TRENDS FOR THE DIGITAL WORKPLACE

The digital workplace trends we expect to see in 2020 have their roots in deeper, long-term “mega-trends” that have been impacting workplace technology for several years.

01 THE MARCH TO THE CLOUD



The impact of organisations moving IT to the cloud has been wide and profound with reports suggesting **96% of organisations** are cloud adopters. Similarly, the expansion of Microsoft Office 365 has also been rapid, with around 27% year on year growth, establishing the platform as the backbone of the digital workplace for many enterprises.

02 RISE OF ANYTIME, ANYWHERE ACCESS



Increasingly digital workplaces can be accessed from any location and at any time, ideally on any device. Employees no longer need to be in a fixed location to work. There are several drivers for this including flexible working patterns, high real estate costs, the need to collaborate across time zones and the better technology options available.

03 A GROWING FOCUS ON EMPLOYEE EXPERIENCE



More and more organisational leaders and HR functions are realizing the importance of “employee experience” and all the different touchpoints between employee and employer. The digital workplace is a core component of employee experience. Just as experience is critical for customers, enlightened organisations are focusing on employee experience as a differentiator to attract and retain talent, and as an enabler of various other positive outcomes.

04

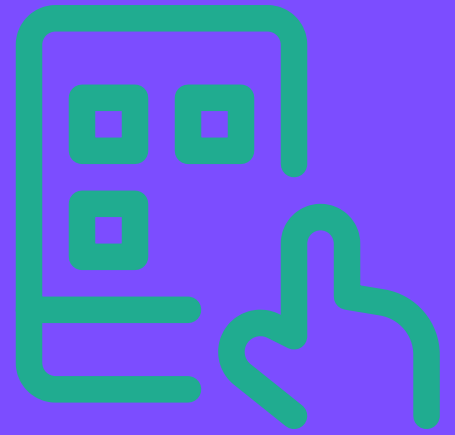
EMPLOYEES DEMAND BETTER WORKPLACE TECHNOLOGY



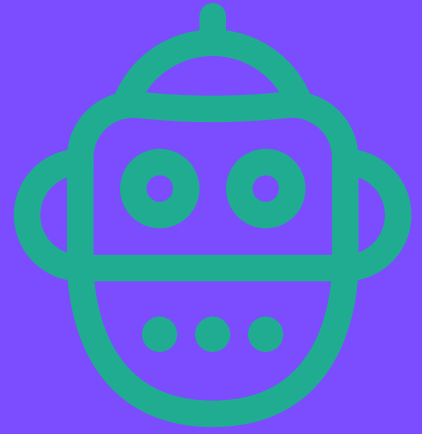
Over the past few years the expectations of employees about the technology they use at work have increased.

The consumer tech, apps and social media we use outside work are often more advanced than the tools in work; now users are demanding similar or even better solutions. This has been influenced by millennials and Gen Z employees who have grown up with better technologies and now make up the majority of employees in some organisations.

05 THERE'S AN APP FOR THAT



The rise of cloud and mobile has fuelled an app revolution where teams and employees can deploy and use sophisticated tools without any involvement from central IT. Within the workplace the range of tools available has rocketed, leading to a proliferation of apps and a complex digital landscape that needs to be managed and unified.



06 ARTIFICIAL INTELLIGENCE (AI) IS BECOMING THE NEW NORMAL

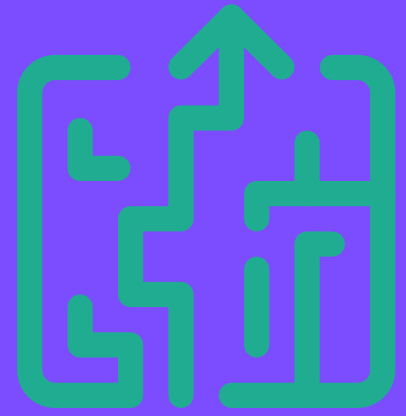
A few years back AI may have seemed futuristic to many, but it has since become real and tangible, and has become normalised through our experiences with customer service bots, personalised playlists or digital assistants like Siri and Alexa. The possibilities for AI, machine learning and automation in the workplace are vast, and its influence on the workplace is now taking root.

07 SECURITY AND PRIVACY CONCERNS TO NAVIGATE



Data security and data privacy have emerged as critical factors in the digital workplace. From phishing scams to data breaches to GDPR, these have significant influence on the way we design and experience the digital workplace. Employees are now also much more informed and cognisant of how their data ownership rights and how it needs to be protected. Expectations are high for employers to have the best and most transparent protocols in place.

08 CLASSIC COMPLEX PROBLEMS GET EVEN MORE COMPLEX



Anyone managing a digital workplace or intelligent intranet will recognize the three classic complex problems of establishing governance, driving adoption and improving findability. These three conundrums have been keeping digital workplace professionals awake at night for years. While these challenges are solvable, they're not going away any time soon.

10

DIGITAL WORKPLACE TRENDS FOR 2020

During 2020 we expect several digital workplace trends to take centre stage. Here's our view of ten of the most important.



01

The digital workplace is growing in strategic importance

In 2020 the digital workplace will continue to grow in strategic importance. In the latest **State of the Digital Workplace report from CMSWire**, 77% of organisations report the digital workplace as an “important” organisational priority.

The strategic value of the digital workplace is a constant theme running through our conversations with clients, practitioners and industry experts, many of whom are seeing active investment in digital workplace tools and platforms such as Office 365.

Meanwhile the range of technology options to optimise the digital workplace experience continues to rise. In the latest **industry-leading ClearBox “SharePoint intranets in-a-box”** report there are a record number of products (52!) covered, a number which is likely to expand.

**77% OF ORGANISATIONS
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02

AI and automation are now touching everyday work

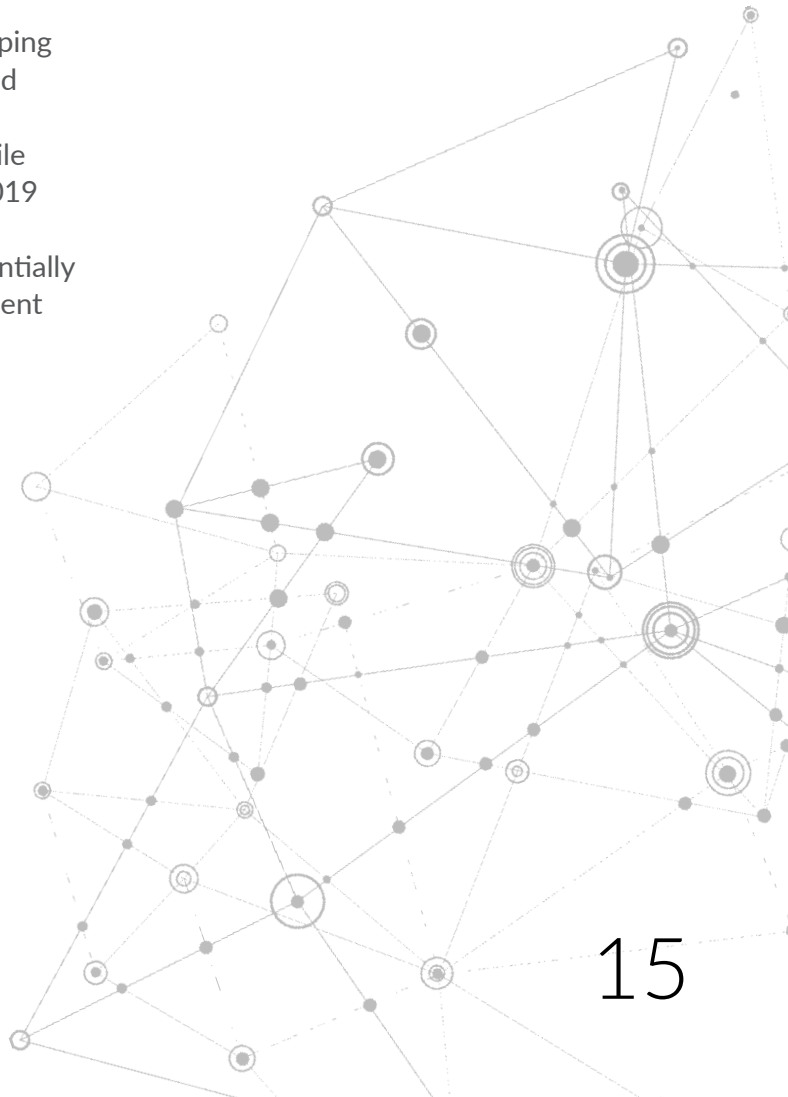
AI, machine learning and automation are the subject of intense media and business attention. Depending on what you read, AI will either condemn us to a dystopian future with no jobs or will save humankind!

The current reality is less extreme. In 2020 AI will continue to touch everyday workday processes by driving efficiency and automating some of our more mundane tasks.

Gartner predicts that by 2022 **70% of white-collar workers will interact with a chatbot every day**. Within organisations employees are encountering chatbots that will answer questions, find items and carry out simple tasks. For example, one of our most popular bots uses AI to remind employees to **complete their employee directory profiles** and then facilitates the actual completion.

The possibilities around AI will also continue to extend. Microsoft is ramping up its AI and machine learning-related frameworks and making it easier to leverage those capabilities. Meanwhile **Project Cortex**, announced in late 2019 by Microsoft, promises to use AI to organise collections of content, potentially revolutionizing knowledge management in the process.

GARTNER PREDICTS THAT BY 2022 70% OF WHITE-COLLAR WORKERS WILL INTERACT WITH A CHATBOT EVERY DAY.



03

Digital workplace access for frontline workers is now business-critical

In the past frontline (also referred to as first line) employees working in retail units, factories or in the field have been considered digitally hard to reach, leaving this key demographic disadvantaged, “unconnected” from digital services and communications. This is usually because they do not have access to a desk during the day, or their needs are misperceived as less of a priority than office-based knowledge workers.

The result is that organisations have missed out on significant opportunities to improve the employee experience for frontline employees, drive greater collaboration and efficiencies and leverage collective insights.

Thankfully this is changing. More and more frontline employees are being included in the digital workplace, usually through targeted mobile apps and ‘pocket’ intranets, quite often accessed through employee-owned devices. For example, at **Nordic building materials supplier STARK GROUP**, all store and distribution staff can now stay informed and access critical operational data from their own smartphones, helping drive better customer service as a result.

In 2020 we expect digital workplace access for frontline workers to accelerate reducing the numbers of frontline employees disconnected from everyday communications, news and collaboration opportunities. Recognising the importance of this area, we **also recently acquired CYCL** and its Condense product, a purpose-built mobile intranet designed for large, deskless workforces.



04

The best digital workplaces focus on people

The best intranets and digital workplaces are centred around the user and their needs. Strongly designed, intuitive interfaces bring real world benefits; user experience experts **Nielsen Norman Group estimate** that improving intranet usability can result in a nearly 100% increase in key attributes such as visits and user performance.

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In 2019 we think that this “focus on people” will start to go beyond good usability and will increasingly align the digital workplace to employee’s concerns about data, organisational values and general HR policies. We see this again related to HR’s increasing interest in the concept of “employee experience”.

During 2020 we can expect to see:

- A greater emphasis on accessibility that matches the commitments leading organisations are making to support diversity and inclusion (D&I).
- More effort to address employee concerns over the privacy of their personal data, building on the compliance-driven requirements to meet GDPR.
- More digital workplaces supporting flexible working patterns by enabling work to happen from anywhere.



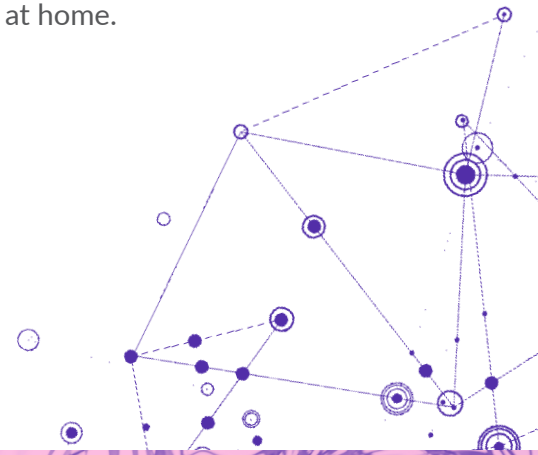
05

HR teams want to transform the employee lifecycle

Recent research **from Deloitte** suggests that 84% of HR teams rate “employee experience” as important, with 28% of teams even regarding it as urgent. With the digital workplace a key ingredient of employee experience and HR teams taking a more holistic approach to HR tech, we believe 2020 will see a growing interest in how digital can transform the employee lifecycle.

The employee lifecycle starts the moment an employee is recruited and follows their key work and life moments such as promotion, internal moves and raising a family. In 2020 we expect HR teams to want to leverage workplace technology to not only improve different stages of the lifecycle but also provide a continuity of experience that positively reflects a company’s overall employment proposition.

Much of the current focus is on the recruitment and onboarding experience. Multiple studies have shown how a strong onboarding experience increases employee retention. However, we’re also seeing HR teams start to look at other elements of the lifecycle such as internal talent mobility, e-learning platforms and health and well-being support such as **‘LiveSmiles’**, an initiative that is a combination of tech, expertise, advocacy and giving, that aims to accelerate the discussion of wellness into an active and intrinsic part of work, and to ultimately drive happier, healthier people at work and at home.



06

Employees want one access point for the digital workplace

A survey from **LinkedIn Learning** found that workload and the associated challenges around maintaining a good work-life balance was the biggest cause of workplace stress. In our view, the morale-zapping levels of information and application overload many of us experience are impacting our efficiency, productivity and quality of the working day.

A recent and unsurprising trend we've seen in digital workplace projects is for user research to report that employees want a single, unified place to go to access their essential content and apps. Employees are fed up with siloes, multiple applications, fragmentation and noise in their digital workplace experience; instead they want a consistent, coherent, simplified, relevant and personalised view of the essential elements they need for their working day.

In 2020 we think this will be a major strategic objective for digital workplace teams, either delivering on that single view or simplifying the application landscape for employees. It is perfectly possible to do something about this, even in the most complex, global organisation. 'At **PepsiCo**, a global food and beverage leader, we built a mobile-friendly intelligent workplace where employees from different divisions and locations could access all the relevant apps and collaboration sites they needed, all from one place.



07

Community Revival: Teams marches on and a new focus on Yammer

The launch of Microsoft Teams has been a huge success for Microsoft with explosive growth – there are now over **20 million daily users**, a number greater than rival tool Slack. Anecdotally, many organisations report that adoption of Teams has taken off in a way that other collaboration tools haven't; some employees are spending most of their working day in Teams.

Recognising that this is now a place where work happens, we've launched **Wizdom for Teams** that allows employees to access the intranet through Teams itself.

We expect Teams to continue to grow in popularity through 2020, especially as Microsoft is still investing in it with increased capabilities and tighter integration with other 365 tools.

We can also expect some re-focus on Yammer. After years of under investment, Microsoft **recently announced an overhaul of the product** that sees a new interface, smarter features, knowledge management capabilities and more power for community managers.

THE LAUNCH OF MICROSOFT TEAMS HAS BEEN A HUGE SUCCESS FOR MICROSOFT WITH EXPLOSIVE GROWTH – THERE ARE NOW OVER 20 MILLION DAILY USERS...

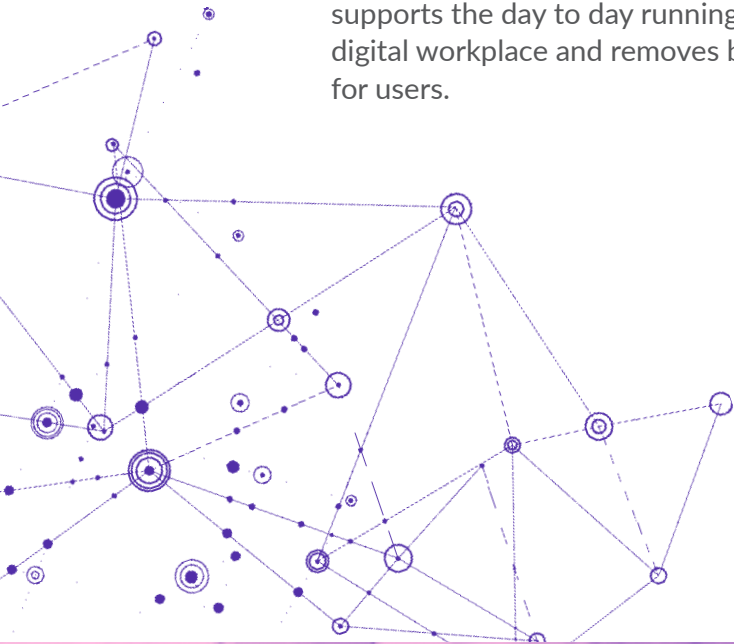
08

The need for governance across the digital workplace becomes a priority

Governance has always been an essential element of a great digital workplace or intranet. In our view, good governance is a pre-requisite for effective collaboration. You need clear policies, processes, roles and rules to maintain an excellent and consistent experience, establish valuable content, have good findability of people and skills and to reduce risks. Governance supports the day to day running of the digital workplace and removes barriers for users.

As more organisations progress with their digital workplace journey, governance becomes more urgent. Digital workplaces are much wider in scope than intranets and governance is required to deliver the best experience possible. We expect this to be a major theme for 2020.

Operationally, robust processes need to be in place. For example, if Teams goes viral it's great for adoption but without governance it can soon create a swathe of duplicate and graveyard sites that confuse and disillusion users. We've found the provisioning engine in the Wizdom intranet solution that adds process, workflow and automation to site creation has been enormously effective in keeping Teams and other workspaces under control.



09

The intranet continues to evolve and redefine itself

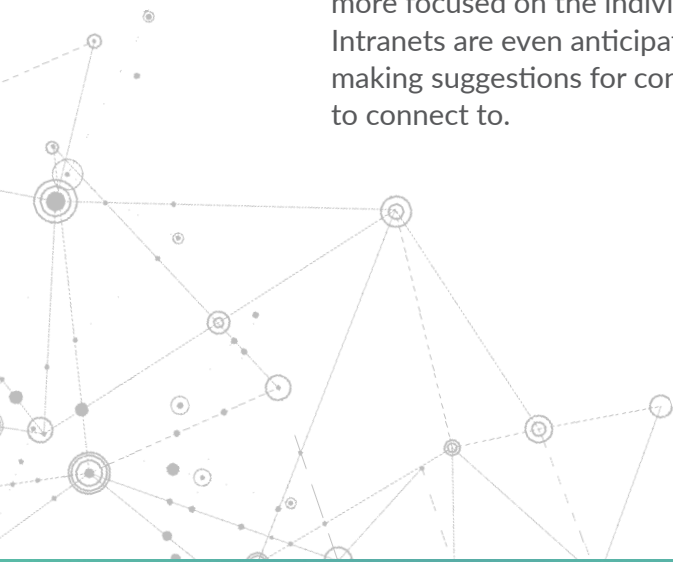
Intranets **have been around for over twenty years**. The reason they are still part of the everyday fabric of the digital workplace is that they have continued to evolve and adapt to the changing needs of organisations and employees, adding capabilities such as personalisation, social features and mobile access along the way.

The 2020 intranet continues to change in two major ways. Firstly, it is becoming the “intelligent workplace”, leveraging highly granular personalisation, dashboard integration, advanced search and even AI and bot frameworks, to become ever more focused on the individual’s needs. Intranets are even anticipating needs by making suggestions for content or people to connect to.

Secondly, intranets are starting to become accessible through other applications. One of our takeaways from the **Gartner’s 2019 digital workplace conference in London** was that more analysts and teams are talking more about “content services” than intranets. This is because the intranet may start to be less of a “destination” in its own right and more to do with the delivery of great content accessible from multiple places.

Our Wizdom intranet product is innovating in this area, establishing **intranet access via MS Teams**, and the “**Power Panel**” – a unifying toolbar that can follow you from application to application and allows you to access aspects of your intranet and digital workplace from anywhere.

Meanwhile with SharePoint Online the technology base of so many intranets, Microsoft’s roadmap will also have a significant impact on intranets in 2020. This year we will see the emergence of Home Sites, a new way to pull together compelling homepages from Modern sites. We’re super proud that LiveTiles has been **named one of Microsoft’s inaugural Home Site partners**.



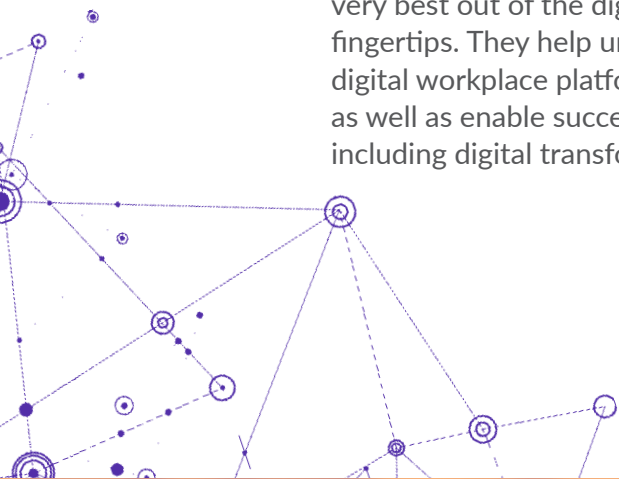
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Digital literacy continues to unlock the power of the digital workplace

Change management is critical for digital workplace initiatives to succeed; in fact Gartner has said that **success is “impossible” without the “associated cultural change”**. Digital literacy programmes and campaigns help management and employees get the very best out of the digital tools at their fingertips. They help unlock the value of digital workplace platforms like Office 365 as well as enable successful outcomes, including digital transformation.

We expect digital literacy programmes to be a real focus for digital workplace teams in 2020. It's worth noting that the most successful programmes are simply not just about how to use tools – they also cover the *why*, the *which* and the *when* – ensuring employees really want to use the tools and are well-informed about which tools to use in which scenarios. This helps drive adoption, break down silos, as well as optimum tool usage.

We see that the most impactful programmes also are targeted and imaginative, designing interventions for managers, leveraging the enthusiasm and energy of champions and peers, and even using gamification to motivate employees.



Checklist: Key questions to consider

Here are some suggested questions to consider relating to each of our top digital workplace trends, providing both thinking and talking points to help you plan for the new year.

DIGITAL WORKPLACE TREND

QUESTIONS TO CONSIDER

The digital workplace is growing in strategic importance

- Is the digital workplace on the strategic agenda of your key stakeholders?
- Do you have a digital workplace strategy and roadmap in place?
- Is your digital workplace strategy aligned to other key strategies and roadmaps in your organisation?
- If you have a strategy do your key stakeholders buy into it and if not, what do you need to do to drive consensus?
- Are there budgets and projects in place to help execute the strategy?

AI and automation are now touching everyday work

- In your organisation are people sceptical or excited about AI, or somewhere in between?
- Do you have a defined AI strategy or plan?
- Who are the AI experts and evangelists in your organisation and how could they organise themselves?
- What are the key processes or quick wins where some kind of automation could improve efficiency?
- How are you using chatbots in your digital workplace and where could they have a real impact?

Checklist: Key questions to consider

DIGITAL WORKPLACE TREND

Digital workplace access for frontline workers is business-critical

QUESTIONS TO CONSIDER

- Can your deskless employees access your digital workplace and intranet?
- Do they use it in ways that help them do their jobs or are there opportunities to make it more useful?
- If your digital workplace is optimised for mobile devices and can employees access it from their own devices?
- If you extend digital workplace access for frontline workers are there any security, legal or regulatory challenges that need to be navigated?

The best digital workplaces increasingly focus on people

- Is your digital workplace truly focused on the needs of users?
- Does it support key HR processes such as diversity and inclusion, as well as your organisational values?
- Is your digital workplace truly accessible, for example achieving AA compliance based on the WCAG 2.1 guidelines?
- Does your digital workplace, intranet and related content support flexible working?
- Do you have mechanisms in place to ensure feedback from employees helps improve your intranet or digital workplace?

HR teams want to transform the employee lifecycle

- Does your digital workplace support better employee experience?
- How do you support employee onboarding and making life easier for new hires?
- How does your digital workplace support the key life and work “moments” that matter?
- Could your digital workplace better support personal growth, learning and internal career development?
- Are your HR leaders included in digital workplace discussions and planning?

DIGITAL WORKPLACE TREND

Employees want one access point for the digital workplace

QUESTIONS TO CONSIDER

- Have you carried out any user research that suggests what your users want and need from their digital workplace?
- Are users included in the design phase?
- Does your intranet reduce or add to information and application overload?
- How can you help employees access all the resources they need in a more efficient way?

Community Revival: Teams marches on and a new focus on Yammer

- What governance do you have in place for your digital workplace and what do you need to put it in place?
- How do you ensure key decisions about the digital workplace are made with agreement from key stakeholders?
- What key processes need oversight to ensure the digital workplace operates at its best?
- How can you use forms and approval workflow to help your digital ecosystem remain under control?

The intranet continues to evolve and redefine itself

- How do you define your intranet and how do your users define the intranet?
- What are the key objectives of your intranet and how well does it perform?
- What's the relationship between your intranet and the wider digital workplace?
- Does your intranet support the employee experience?
- How could your intranet evolve to make it more useful and relevant?
- Is your digital workplace future-proofed?

Digital literacy continues to unlock the power of the digital workplace

- What change management and training is in place to support better adoption and use of digital tools in your organisation?
- Do you have a digital literacy upskill programme in place and what are its aims?
- If you have a digital workplace programme does it cover the benefits of using tools as well as "how" to use them?
- Is your programme targeted to the needs of different groups?
- What could you do to make your digital literacy programme more engaging and impactful?

Partner with us in 2020

2020 will be an exciting year for the digital workplace. Underperforming intranets are on their way out. Instead, we'll be seeing the rise of the intelligent workplace, leverage cutting edge collaborative tech including AI-enabled bots, real-time insights and a user experience worthy of Gen Z's expectations (in 2020 Gen Z will become one third of the world's population!).

We hope you've found this guide to the digital workplace trends interesting and helpful, providing you with thinking points for your team and talking points for your key stakeholders.

If you're as excited as we are about the potential for the intelligent workplace then come and partner with us. Get in touch, let's see how LiveTiles can support you.

We are passionate about digital transformation and about digital workplace technology that empowers people to do their best work. We are here to support and partner with businesses and organisations who are embarking upon their intelligent workplace journey and are strongly motivated to work together. If you'd like to discuss any of the points in this eBook and discover how LiveTiles can empower you, then please do get in touch!

Wishing you a productive and prosperous 2020!