

# The Future is Flexible

2021 state-of-tech-leadership  
survey results and workplace trends

Including remarks from

 chrome enterprise  citrix  vmware  DELL Technologies

 hp  box  intel  zoom  Google Workspace

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# In brief

- **Google and Accenture surveyed 300+ technology decision-makers** and leveraged the latest research to better understand emerging business concerns related to technology and priorities coming out of the pandemic
- It has become clear that the exponential increase in the rate of change we experienced during **COVID-19 is just the beginning**, and businesses need strategies and technologies that can keep up with this new reality
- To unleash new, agile strategies at speed, business and **technology leaders are going to need tailored, integrated, and interoperable technology architectures** that do not just keep up with but actively drive these strategies



# Part one

**COVID-19**  
**catapulted**  
**us** into a new  
pace of change

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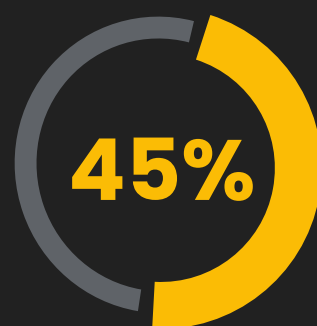
# COVID-19 catapulted us into a new pace of change

**COVID-19 forced companies to break through technological and cultural norms to adapt overnight to pandemic conditions. Though many companies responded with unprecedented investments in their technology solutions and WFH capabilities, the need for this dynamism and agility is not over; the unrelenting pace of change COVID unleashed is here to stay.**

What we must first accept is that the impact of COVID was not an anomaly. The catalysts for high-velocity change were not contingent upon the pandemic: advancements in digitization, automation, globalization, and artificial intelligence, and the corresponding network effects among these factors, have been slowly building for the last decade and are now cemented and staged to accelerate the next wave of change.<sup>1</sup> The virtually overnight response to COVID is a prime example of these forces at work.

Before COVID took hold, remote work had in fact been rising for the last decade, increasing by 173% in the US from 2005 to 2018.<sup>2</sup> It was not until leaders were empowered by the high velocity catalysts and sparked by the pandemic's necessity that they took action to invest in forward-thinking capabilities. That action has enabled remote work to rise to the prominence it has today and **45% of the current remote working population was enabled by these investments.**<sup>3</sup>

**The overnight office exodus would not have been possible without the corresponding overnight investments in more flexible technology solutions.** Data shows 85% of businesses accelerated the adoption and implementation of digital communication and collaboration tools<sup>13</sup>; roughly ~40% of organizations invested in productivity management tools, remote monitoring, devices (e.g., laptops, phones, etc.), and / or learning and training tools to support remote work<sup>7</sup>; and businesses invested nearly 3x more in Cloud with **70%** planning to increase spending.<sup>7</sup>



of the current remote working population was enabled by investments made in response to the pandemic

**We are entering the age of hybrid with no turning back** to “always in the office.”

Norms have begun to shift and employee expectations of and influence over technology decisions have skyrocketed in response to improved remote experiences. The technology investments made during COVID were largely a success – so much so, in fact, that **45% of employees say they are more productive working remotely** than in the office<sup>6</sup> and **55% would prefer to be remote at least 3 days a week.**<sup>4</sup> Now, only **4% of employees** (down from 30% at the beginning of the pandemic) **want to return to the office** as it was before.<sup>5</sup> Many of these employees will likely get their wish as technology decision-makers expect an average of 30%–40% of their companies’ workforce to be remote in the next few years,<sup>1</sup> 10pts above previous estimates [2020].<sup>12</sup>



**of companies are planning on being fully remote moving forward and are never returning to the office.**<sup>1</sup>

As a result of this success, remote work is slated to outlive its pandemic origins: **52% of companies are still looking to enable work from any device and 37% work from any location.**<sup>1</sup> These plans align with planned investments as technology decision-makers are already taking steps to make hybrid work a

continued reality: **70%+ of executives are planning new investments in virtual collaboration tools and IT infrastructure** to secure virtual connectivity and support hybrid work and **~50% are investing in tools and apps to enable the changing in-office work environment.**<sup>4</sup> The way businesses do business is changing and companies are investing to ensure they can keep up.

And while business and technology leaders can be proud of the progress made to respond to COVID, they cannot afford to be complacent. The headwinds of the next major change are around the corner: the reduced desirability of living in cities driven by cost of living and renewed health concerns, a more urgent focus on climate change and sustainability, and the expected expansion of temporary workers and contractors in the workforce.<sup>13</sup> These are just a few of the knowns; there is so much more that we cannot even anticipate. The one thing we do know is that change will come, and it will be swift.

**“Modern computing means anywhere, any time, fully resilient, fully compliant, and accessible from any device. Timely, secure, and relevant.”** – CXO, Media & Entertainment



## Part two

**The winners of  
tomorrow** will be  
those who invest in  
their tech agility today

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# The winners of tomorrow will be those who invest in their tech agility today

Those who proactively invest in their organization's technological agility will be best equipped to not only meet the next major disruption but forge their own strategic path, unfettered by reactionary, band-aid decision-making.

With the emergent fast-changing market, technology strategy and business strategy are becoming increasingly co-dependent. Companies can only be as innovative with their strategies as their technology will allow: **89% of executives believe that "their organization's ability to generate business value will increasingly be based on the limitations and opportunities of their technology architecture."**<sup>7</sup> And in the new fast-paced world, leaders no longer have the luxury to wait for their technology to catch up with their business strategies, and they know it, as **77% say their technology architecture is becoming critical to their company's overall success.**<sup>7</sup> Those who have recognized and acted on this understanding are reaping the rewards – **digital leaders are outgrowing the competition by 2–3x**<sup>7</sup> with technology architectures that don't just align with their strategy but actively enable and drive it.

***"I believe modern computing is leveraging technologies in the most unique way possible for your company's needs...being forward thinking and implementing technologies to future proof."***

–CXO, Digital Forensics

Digital leaders are outgrowing the competition by

**2–3x**

with technology architectures that don't just align with their strategy but actively enable and drive it.



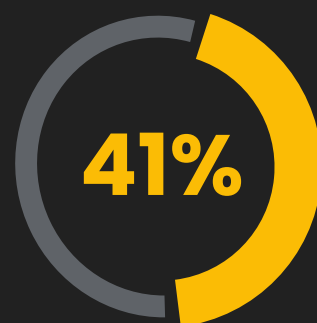
**With flexible technology architectures, digital leaders can focus on their strategy,** innovation, and the future without being bogged down by or locked into legacy technology constraints. Digital leaders are able to look to the future while laggards are stuck in the present: **41% of digitally advanced companies are focused on adopting new technologies** with a clear eye toward driving innovative business practices, while **39% of digitally immature companies are focused on maintaining their current IT stack and keeping the lights on.**<sup>1</sup>

Digital leads can proactively manage change head on while laggards are stuck playing catch-up. This divide plays out clearly in the example of hybrid work: there is a **25pt gap between digitally advanced and immature companies** in terms of their ability to collaborate virtually as well as they do in-person.<sup>1</sup> And the gap between digital leaders and laggards will only continue to widen as laggards are held back from achieving their strategic goals and vision by static, inflexible architectures that dominate technologists' time with maintenance activities.

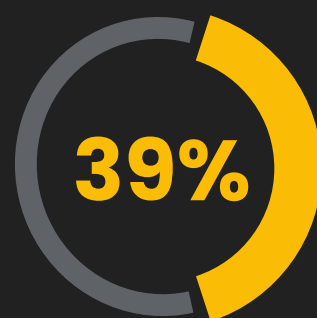
**“To me, modern computing means explosive new architectures that fundamentally change computing.”**

–Manager, Telecommunications

**Digital leaders are able to look to the future while laggards are stuck in the present:**



of digitally advanced companies are focused on adopting new technologies



of digitally immature companies are focused on maintaining their current IT stack<sup>1</sup>



## Part three

We need a tech  
solution today  
**that is ready  
for tomorrow**

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# We need a tech solution today **that is ready for tomorrow**

There is a clear need for tailored, integrated, and interoperable technology architectures to build the future they want for their business.

With technology so closely tied to strategy, business technology architectures need to be as unique as their strategies are.

There is no one-size-fits-all, and yet that is exactly what so many technology behemoths offer today. Across industries, we see a great deal of variation in priorities – for instance, **Financial Services’ #1 IT priority is minimizing security risk**, while in Healthcare, the **#1 priority is end user productivity and experience**.<sup>1</sup> It is not just industry differences that drive differentiated needs; **there is a 30pt difference in confidence in web-based SaaS solutions’ ability to support hybrid work** between Enterprises and Small-to-Medium Businesses, with larger businesses being more confident.<sup>1</sup> Companies need technology architectures that are as unique as they are and flexible enough to evolve as their strategies do. It doesn’t make sense anymore for a global commercial bank to have the same architecture as a regional hospital – customizations at the margin aren’t going to cut it when technology is so closely intertwined with business strategy. These businesses need to create the environments they can thrive in rather than battling their static, boilerplate infrastructure to fit their vision.

”*Modern computing means using computing to problem solve — with the greatest ease possible and minimal effort required by the end user.*”

–C Suite, Manufacturing

## Financial Services

#1

IT priority is minimizing security risk

## Healthcare

#1

priority is end user productivity & experience.<sup>1</sup>

**And it is not enough to solve for individuality. Technology architectures still need to solve technologists' concerns today.** Technology decision-makers often have real concerns around security, employee experience, and IT complexity, and when looking at their overall technology strategy and considering the best solutions. Technology decision-makers continue to face challenges minimizing security risks, naming security as both the #1 challenge they face as well as the #1 priority for the next 1–2 years.<sup>1</sup> Security is a consistent overall concern for the technology stack but is reduced to tables takes when evaluating any one technology solution (#5 out of 10 factors<sup>1</sup>), suggesting that technology decision-makers are really struggling with figuring out how to secure their end-to-end architecture once it is all pieced together. It is then unsurprising that technology decision-makers are also concerned with simplifying management across their various solutions: **ease of management is the #3 top criteria out of 10 factors for technology solution evaluation and #1 top blocker for adopting best-in-breed technology.**<sup>1</sup>

And it is not just about the IT admin experience; the end user experience is still critical – end user ease of use is the #2 out of 10 decision-making factors and **57% of technology decision-makers need to see an improvement in employee productivity to consider best-in-breed solutions.**<sup>1</sup> No one wants to spend more time than necessary wrangling tools (on the back end or as an end user), so these will be key hurdles to overcome as companies seek to build unique architectures that work for them. There is a need for “a unified approach at solving the security and performance-on-demand challenges that companies face” (Modern Computing Alliance IT Council Member).

### Top 3 challenges faced by Technology decision-makers

- #1** Security
- #2** end user ease of use
- #3** ease of management

# **Take charge** of your business' future

**Companies need to act fast to establish the technology architectures that are going to unleash their next strategy and stay ahead of the change engine that continues to accelerate. Here's how to get started:**

- Evaluate your organization's ability respond to change with investments in core technologies against your competitors
- Assess how well your business' technology is aligned with its overall strategy
- Invest in the ongoing relationship and collaboration between business leaders and technology leaders
- Join the [Modern Computing IT Council](#) to get involved in conversations that will reinvent the technology landscape

# Sources

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# Part four

## Remarks from the **MODERN COMPUTING ALLIANCE**

**MODERN  
COMPUTING  
ALLIANCE**



chrome enterprise





# This research confirms just **how fast tech is evolving.**

**An integrated, data-driven roadmap for the future has never been more critical, and this will help the Modern Computing Alliance build it**

Chrome Enterprise, and Google as a whole, are committed to building toward a more flexible future. Seeing these survey results and knowing that the technology industry is already heading in that direction is incredibly exciting.

We strongly believe that everyone should have access to a secure and collaborative experience on any device, from anywhere — with an innovative and fully integrated stack that's easy for IT to manage. Together, with the rest of the Modern Computing Alliance, we will use these insights to create a clear path forward, improve customer choice, and make our collective vision a reality.

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To drive innovation, you need  
to have **the right foundation.**

**That's why we're prioritizing a great employee experience  
for hybrid workers and the infrastructure for simplified  
IT management.**

This research report makes it clear that our customers and IT professionals want tools that clear the way for them to concentrate on the core competencies that drive innovation. We're creating a simple path to help them do it.

With a focus on both IT and end users, our fully integrated digital workspace platform strategically brings together VDI and DaaS, content collaboration, unified endpoint management, networking, security, analytics and solutions that simplify work execution and collaboration.

We're also working with our partners in the Modern Computing Alliance to make it easier for companies to meet the future head on with the ability to address disruptions, respond to security threats with confidence, and stay ahead of both market changes and government mandates. And we can't wait to see what happens next.

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## It's time to evolve **beyond** **supporting remote work.**

**This study is a resounding validation that the current shift in workforce attitudes and technology is here to stay.**

To be successful moving forward, companies must become true work-from-anywhere organizations.

Along with our valued ecosystem partners, VMware aims to create easy-to-integrate systems that help businesses build trust for today's distributed workforce. This will be done by enabling highly engaged employees, reducing costs and operational overhead, and delivering broader, more effective security that follows users, data, and apps, wherever they are.

In support of this transition, VMware developed the Anywhere Workspace, which combines Unified Endpoint Management, Desktop and App Virtualization, Secure Access Service Edge, and Endpoint Security technologies — and we're confident we'll be ready for whatever comes next. Are you?

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## The PC experience evolution is happening now.

**We all know hybrid work is here.  
Now, let's make it amazing.**

At Dell, we like to refer to hybrid work as a do-from-anywhere world, where collaboration happens in many forms.

We're investing in key areas to make the PC even more personal, intelligent and beautiful. We're doubling down on collaboration and connectivity because we know this is no longer optional. And we are not letting our foot off the gas when it comes to sustainability and security because we know these are non-negotiable.

Driving an open and innovative ecosystem is imperative and we know our role in the Modern Computing Alliance will play a huge role in this and our customers' experiences.

Hybrid work isn't a potential future, but a pressing reality--and we're in it to innovate



## **We're helping IT deliver for the new hybrid workplace.**

**Together with the Modern Computing Alliance, we're working on innovation that makes it easier for people to stay connected, engaged, and productive, wherever their work takes them.**

A survey conducted by HP revealed that 84% of IT decision makers believe IT is more responsible than ever for the success of their business. This valuable new research from the MCA further unveils the imperative for businesses to adapt to our new age.

The efforts of HP and the MCA will make that job easier. In fact, we've already used deep customer insights to develop HP's innovation engine, which delivers personalized computing experiences for today's business users and solutions for the IT teams that support them.

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## The way we work is changing in all the best ways.

**In this next normal, no one is ever left behind, regardless of their location or work modality.**

Enterprises can't assume that all team members will be present for every meeting. There's going to be a rise of the new collaboration stack to allow for both synchronous and asynchronous collaboration.

Documentation, recordings, and content will be easily accessible so that all team members will know what was discussed and agreed upon, and what the next steps are.

The future of work will inevitably involve more flexible ways of working and today's enterprises need to embrace technologies that make this possible, while maintaining employee productivity, security, and compliance of content.

These changes are already underway and the work we're doing with the Modern Computing Alliance will make it easier for everyone to choose best-of-breed tools and thrive.

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# Empowering you to create, collaborate, and connect **in the hybrid workplace.**

**Design the future you want with innovation that supports how you want to work and where you want to work to deliver your greatest contributions.**

We are committed to acceleration innovation to deliver solutions that offer powerful multitasking and collaboration capabilities, that are secure from the edge to the cloud, that work seamlessly in any location, and that allow IT to manage from anywhere.

Together with our partners, we will continue to push the boundaries of innovation to drive amazing end-user experiences and IT solutions for the hybrid workplace.

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# Employee experience is the new transformation strategy

**Covid-19 changed everything in every industry, everywhere. It is not about digital transformation, It is about digital disruption and the hybrid experience.**

Work is something we do. The office is a place. The question is now, what is the purpose of the office?

We have clearly demonstrated we can work productively from anywhere. The hybrid experience provides incredible opportunities for employees and employers. We can recruit without geographical boundaries, it endorses and supports diversity, equity and inclusion.

We are excited to drive this Golden Age of Hybrid Work with the Modern Computing Alliance through innovative cloud communications, purpose-built workspaces, and relentless collaboration.

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# This is how **reshaping the future** is done

**The Modern Computing Alliance and Google Workspace  
will use these insights to inform the future of work, today.**

How people connect, collaborate, and create — across has changed so much, so fast. And having this data to quantify that change will be a huge advantage as we look toward the future, iterate, and learn how to best support the millions of customers and billions of end users who trust Google Workspace to bring their own future visions to life.

As the way work happens continues to evolve, we'll all need solutions that are more flexible, helpful, innovative, and inspiring and that's just one of the reasons this report and the Modern Computing Alliance are so important. We're honored to be a part of it.

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