The stuff they don’t tell you about digital workplace transformation

Tips and tricks for getting past those ‘people problems’

Freeform Dynamics, 2018
Executive Summary

The latest devices, productivity tools, collaboration systems and other end user focused solutions have the potential to totally transform the way people work. In recognition of this, many now aspire to the creation of a ‘modern digital workplace’. But while technology today has a lot to offer, how do you get past some of the traditional people-related challenges to get everyone pulling together towards a common goal?

Key points

End user computing has been a common source of frustration and conflict
Many employees have strong opinions on the equipment, software and services they use to do their job, but people frequently disagree on what’s right or wrong. It has traditionally been very hard for IT to meet business needs and keep everyone happy.

But there’s a huge opportunity if priorities and objectives can be aligned
Modern devices, productivity tools, collaboration systems and other solutions can transform the way people work, with the potential to deliver better user experiences and significant competitive advantage, as well as to reduce business risk. Harmonising priorities and objectives means first appreciating that business managers, end users and the IT team all have different and legitimate perspectives that must be aligned.

Key to success is redefining the role of the IT team as one of enablement
The traditional IT approach of control and lock-down is no longer sustainable. The most effective way to meet constantly evolving business needs and user expectations is for IT teams to adopt an enabling mindset and aim for a ‘managed agility’ approach.

IT leaders need to do some groundwork, so they can engage confidently
It’s much easier to engage with those in the business and gain consensus on digital workplace decisions if steps are taken to allow IT to give a “Yes” response more often, and/or to provide informed, empathetic advice on alternatives. These include:

- Creating an open and flexible operational and management infrastructure
- Developing a sound understanding of the user base via segmentation analysis
- Appreciating the emotive nature of devices, and mapping ‘needs’ objectively

The big prize is full digital workplace transformation
Modern digital workplace technology can yield significant benefits if deployed tactically, but the biggest returns will come from a more strategic approach, and this needs to go hand-in-hand with cultural change led from the top.

IT teams can become a strong catalyst for strategic transformation
As most major initiatives in business nowadays involve a technology component, the IT team is in a great position to influence direction. It can educate business leaders on the ‘art of the possible’ and help them to develop a clear digital workplace vision.
Introduction

A remark made by a CIO at a recent Freeform Dynamics roundtable sets the scene quite nicely for what we are about to cover in this paper. She said: “I keep hearing people refer to ‘The Business’ as if it were just one entity, but my team supports a whole range of divisions and departments that constantly bicker and pull us in different directions. And that’s before we get to dealing with users who now believe they are technology experts and know better than IT”.

You’ll appreciate the need to protect the anonymity of this candidly-talking CIO, but her words clearly struck a chord with others in the room.

Common challenges

During the subsequent discussion, some common experiences were highlighted that most had encountered to one degree or another in recent times:

- A perception within some parts of the business that the corporate IT team is unable to keep up with changing end user computing demands, particularly in relation to the devices, applications and services provided to employees to help them do their jobs and adopt modern ways of working.

- Business units, and even individual users, taking control into their own hands and making technology decisions independently of IT, e.g. by procuring solutions directly out of departmental budgets or via expenses. The desire of some employees to use personal devices for work is related to this.

- Challenges resulting from business managers and users often taking a very narrow view of requirements and not considering bigger-picture matters, e.g. the need for systems and people to work together efficiently, effectively and harmoniously in a robust, supportable, secure and compliant manner.

This last point reflects the frequent assumption that users are always best qualified to specify the technology they need to do their jobs. This sounds reasonable, but the reality is that they often don’t know what they don’t know. The result, all too frequently, is a well-meaning decision that solves the immediate problem at hand, but ultimately works against the broader objectives of both the user and the business.

Recognising the ‘human factor’ as an important key to success

Against this background, it’s understandable that some IT leaders regard end user computing as an ongoing problem area, in extreme cases even a battleground on which business people and IT teams constantly fight.

Yet the huge advances in technology and services we have seen in recent years have the potential to totally transform the way people work, and to create significant business advantage. A modern digital workplace can boost employee motivation and productivity, allow people to collaborate and innovate more effectively, and deliver a user experience that encourages top-talent to join and remain with the organisation.

To unlock these benefits and to drive associated transformation and satisfaction, however, requires looking beyond the technology itself. It’s critical to recognise the importance of the human factor and to take steps to get everyone pulling together in the same direction. In the remainder of this paper, we’ll provide some thoughts and advice on how to achieve this based on real-world inputs and experiences.
First things first

The term ‘digital workplace transformation’ refers to the creation of a technology enabled environment that allows employees to work in the most efficient, effective, satisfying, safe and secure manner. Such an environment will be extremely flexible to accommodate different ways of working and allow the organisation to keep up with changing requirements as both technology and working practices evolve over time.

It’s a great vision, but you’ll know from experience that even the simplest of projects in the end user computing space often stall or stumble because of disagreements on what’s important and how to achieve it.

Given this backdrop, we have structured our paper to first address some of the everyday fundamentals of dealing with people and relationships, before looking at visioning and strategy. This might appear to be back-to-front, but it allows us to provide some actionable insights and advice that will be useful to you regardless of your ambitions and progress at a strategic transformation level. It also means that when we get to discussing how to create and drive that strategic vision and plan, you’ll be less likely to be thinking “Nice idea, but that’ll never work in our organisation”.

Stakeholders and perspectives

A good place to start on our journey is to consider the different types of stakeholder and their perspectives on the digital workplace discussion. At the highest level, there are three of these (Figure 1).

<table>
<thead>
<tr>
<th>Business management</th>
<th>End user</th>
<th>IT team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen</td>
<td>Empathise</td>
<td>Respect</td>
</tr>
<tr>
<td>Empathise</td>
<td></td>
<td>Harmonise</td>
</tr>
</tbody>
</table>

This is clearly a simplified picture of the world, but it’s a good starting point to get us thinking in the right way and appreciating what’s behind the differing views and priorities that so often result in misunderstandings and misalignment of expectations:

**Business management:** The priorities here reflect those of the business. Words like efficiency, productivity, security, compliance, visibility, and so on reflect ongoing fundamentals. But in today’s competitive environment, attracting, retaining and getting the most from the talent you hire is also important. This includes enabling employees to collaborate on everything from innovation to serving customers.

**End user:** The perspective here is that of the individual. Most employees, especially those in professional and administrative roles, rely on technology to get their jobs done. They want solutions not just to be functional, but easy-to-use, flexible and...
reliable, and to take account of their personal preferences. Things like security and compliance are typically viewed as inconveniences rather than priorities.

**IT team:** In many ways, those in the IT team are caught between business management and end user priorities. They must deliver on user needs and wants, while at the same time ensuring that bigger-picture business objectives are met, and IT-related costs and risks are kept under control. A specific priority is to avoid undue complexity, as this tends to hamper service delivery and support.

When looking at the above, you might legitimately point out that views and priorities often differ between senior executives, as well as the line-of-business managers and functional heads that exist across the organisation. You might also draw attention to the fact that end user needs and wants can vary immensely depending on their role and where they sit within the business. All of this is true, and then you can add the struggles and conflicts that sometimes take place even within a single person’s mind, e.g. a business manager pushing for economies of scale one minute, then asking for a costly exception to be made for them individually based on a personal desire.

So how can you meet business needs while keeping everyone happy without ending up with a support and maintenance nightmare within IT?

**Revisiting the IT-Business relationship**

One way forward is to lock everything down based on what the IT team can fit within the budget and be confident of integrating, securing, supporting and so on. This has been the most frequent approach taken by IT teams in the past, and indeed some still operate on this basis. With the pace of technology and business change, however, and the ease with which departments and individuals can nowadays acquire solutions independently of IT, ‘total lock-down’ is not sustainable. Try to force it and activity will go ‘underground’, leading to uncontrolled ‘shadow IT’ or even general anarchy.

The trick is therefore to move from a ‘controlling’ to an ‘enabling’ approach (Figure 2).
If you are an IT leader or are instrumental in delivering and supporting end user computing solutions and you haven’t yet made this mindset shift, this must be your first priority. This isn’t about giving up control completely (and letting anarchy reign), it’s about focusing on the elements of the environment that it makes sense to define, implement and manage centrally.

**Building on the right foundations**

It’s outside of the scope of this paper to go into lots of detail on the technologies and infrastructure options that can help you to build an environment that will support the ‘managed agility’ approach. Suffice it to say for the purposes of our discussion here that the recommended strategy is to implement a strong systems core with a flexible but properly monitored and managed edge (Figure 3).

*Figure 3*  Everything becomes easier with the right systems architecture and infrastructure in place

If you are interested in exploring infrastructure and architecture options further, you’ll find a lot of good information out there from credible sources. It’s also worth engaging with technology suppliers, especially those with a broad solution and service portfolio. The right partner can work with you on initial assessments and assist you in evaluating the different ways of meeting your needs.

**Think holistically, act incrementally**

The chances are that you have many of the components you need already in place, so it’s often a case of just filling the gaps, extending the scope of solutions, or simply integrating and/or using them in a slightly different way.

In many ways, a good tip is not to start by trying to construct the perfect environment, but to get into the habit of considering what you need to do to say “Yes” to that latest request from the business, while avoiding technical debt and business risks, and gearing yourself up to more easily handle future requests of that kind.

Once you take a more enabling rather than controlling stance, a lot of things become much easier, not least driving productive conversations with users and stakeholders.
Engaging more positively

At the start of this paper we quoted the CIO who highlighted how hard it can be to define requirements when business units seem to be asking for different and often conflicting things. It could be as simple as one group pressing for iPads, and another insisting that Windows-based tablets and convertibles are the way forward. But disputes often arise around software and service options too. At the time of writing, examples include Google’s G-Suite versus Microsoft’s Office 365, Dropbox versus Box, Slack versus Microsoft Teams, and the plethora of alternative solutions in areas such as note-taking, creative authoring tools, project management, CRM, and so on.

Helping business users to help themselves

One of the challenges is that users often latch onto a specific solution in a fairly arbitrary manner, i.e. the first thing they come across that does the job quickly becomes their ‘preferred’ or even ‘must have’ device, product or service. With the right infrastructure and an enabling mindset, the IT team has no axe to grind (other than looking out for what’s in the overall interests of the business) so it’s in a better position to facilitate positive and objective discussions.

As we said earlier, unnecessary complexity and diversity is not in anyone’s interests as it drives up costs (less money to spend for everyone on meeting actual needs), and it gets in the way of employees being able to collaborate and generally work together effectively. When you are acting as an adviser, perhaps even an arbitrator, a good tip is to therefore get people to take a step back from the specifics and look at requirements more generically – it then often becomes clear that their needs are nowhere near as different as they were initially perceived (Figure 4).

As one workplace transformation programme manager said to us recently: “We had a group advocating Box, and another Dropbox. When we talked it through we majored on what they had in common - the fact that they were both asking for IT to endorse and support a ‘Sync and Share’ service. Once we steered the discussion towards the value of enabling the two groups to collaborate and share documents with each other, as well as with other departments and even partners and key clients, the conversation switched to which solution would best suit that broader set of needs”. Getting people talking like this has the added benefit of taking the heat out of conflict situations.

But how do you deal with scenarios in which genuinely different requirements do emerge? This is where a more proactive and structured ‘user segmentation’ exercise can help.
The importance of understanding your users

In our work as analysts and advisors, we often hear questions such as “Is desktop virtualisation suitable for our workforce?”, or “Should we be routinely replacing traditional laptops with tablets or convertibles?”. Our usual response is: “Almost certainly for some users, almost certainly not for others”. This isn’t us hedging our bets or trying to duck the question, it’s a way of highlighting that such decisions are impossible to make unless you have a specific type of user in mind.

To pre-empt having to address these decisions on an ad hoc basis, and to allow some forward planning and proactive investment, we would always advise analysing the composition of your workforce to segment users into groups that have similar characteristics and requirements. Such an exercise also allows you to set IT and information related policies appropriately. What’s strictly prohibited for some users might be critical for others to do their jobs effectively, e.g. sharing documents outside of the organisation or having the freedom to install ‘non-standard’ software on a corporate device.

The scope of your study (and the way you group or categorise users) will vary depending on the nature of your business, makeup of your workforce, and regulatory and other constraints you need to consider, but here is an example to give you an idea of the kind of analysis you are aiming for (Figure 5).

### Example User Segmentation Exercise

<table>
<thead>
<tr>
<th>WORKING PATTERNS</th>
<th>HANDLING OF SENSITIVE DATA</th>
<th>END USER TECH IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Usual place(s) of work</strong></td>
<td><strong>Level and type of mobility</strong></td>
<td><strong>Commercially confidential</strong></td>
</tr>
<tr>
<td>Business managers and executives</td>
<td>Head and branch office roaming</td>
<td>Moderate on-site and field</td>
</tr>
<tr>
<td>Finance and accounting staff</td>
<td>Fixed desk at head office</td>
<td>Occasional on-site</td>
</tr>
<tr>
<td>General administration staff</td>
<td>Fixed desk at head or branch office</td>
<td>Little or none</td>
</tr>
<tr>
<td>Tele-sales and service agents</td>
<td>Hot-desk in call centre</td>
<td>None</td>
</tr>
<tr>
<td>Branch sales and service agents</td>
<td>Retail outlet or service centre</td>
<td>On-site only</td>
</tr>
<tr>
<td>Product/project management</td>
<td>Office roaming and client/partner sites</td>
<td>High on-site and field</td>
</tr>
<tr>
<td>Engineering and R&amp;D professionals</td>
<td>Office roaming and client/partner sites</td>
<td>Moderate on-site and field</td>
</tr>
<tr>
<td>Field sales and service professionals</td>
<td>Home, ‘the road’ and client sites</td>
<td>Constant field</td>
</tr>
</tbody>
</table>

**Figure 5** Getting to know your users and how to segment them objectively

Most of what you see here should be self-explanatory, and the value of such insights when looking at mobility, connectivity, security and data management requirements is obvious. It’s worth paying particular attention to the last two columns, however, as these can help you prioritise when planning improvement initiatives. The higher the...
In the face of constantly-evolving technology capabilities, business requirements, user expectations and external forces, the direct and competitive cost of doing nothing can be high.

Appreciating the cost of doing nothing

While the case for workplace modernisation and transformation can be strong and compelling when made effectively, investments in this area will clearly compete with other priorities that can be more front-of-mind at executive-level. If you encounter difficulties in driving the workplace agenda, the trick is to highlight that the reverse of the positive relationships highlighted above is also true, i.e. the longer you defer modernisation, the more productivity, innovation, motivation, talent management, etc will drift, along with the organisation’s overall ability to compete in the market.

Put simply, in the face of constantly-evolving technology capabilities, business requirements, user expectations and external forces, the direct and competitive cost of doing nothing can be high (Figure 6).

Some important dynamics are beyond your control

- **Technology Advances**
  The industry continues to make faster, more efficient and more effective workplace solutions.

- **Degradation with Age**
  Existing systems become progressively less reliable and harder to maintain and support over time.

- **Evolving Security Threats**
  Criminals finding ever new ways to attack the business via users and the tech they rely on.

- **Evolving Regulation**
  Whether in relation to finance, safety or privacy, the regulatory landscape constantly changes.

- **Increasing Expectations**
  The point of reference for users is the consumer tech experience, which keeps getting better.

- **Competitor Investment**
  Other businesses in your sector continue to modernise and transform their digital workplace.

Opportunity Cost
- **Inability to exploit new technology and working practices to increase productivity and innovation**

Friction and Overhead
- **More time-consuming, and unfulfilling work for IT teams, and frustration and disruption for users**

Business Exposure
- **Existing countermeasures become increasingly less effective, and older systems more vulnerable**

Legal/Reputational Risk
- **Aging tech, ad hoc BYOD, and out-of-date working policies undermine visibility and control**

Staff Related Issues
- **The growing consumer/workplace experience gap undermines motivation, recruitment and retention**

Market Disadvantage
- **Competitors’ better able to attract/keep talent, and boost employee innovation and productivity**

Taking no action has clear and negative implications

You can probably think of other factors relevant to your organisation, but when the implications of failing to progress are laid out like this, using language that business executives can understand, they generally get the point. If, having been properly appraised of the implications, budget-holders still refuse to allocate funds to much-needed upgrades and modernisation, you can work on the ‘accountable “no”’ principle, i.e. get them to explicitly acknowledge the consequences of not acting, and take formal responsibility for their “no” decision. You obviously don’t want it to come to this, but it’s a useful tactic that can sometimes help to focus executive minds.

The emotive topic of devices

Turning to the other important constituency, one of the most emotive topics for users is that of devices. Beyond practical matters such as usability, reliability and general fitness for purpose, the device (or devices) you are given is often taken as an indicator of status or personality, and a signal of how much the company values you.
Decisions in this area are made even more complicated by the sheer number of device options now available – different form-factors and specifications, ruggedisation options, etc – not to mention accessories like wireless docking stations. The good news, however, is that you can build on your user segmentation analysis and use it as the basis for device suitability mapping (Figure 7).

Figure 7  Exploiting user segmentation analysis to plan and execute an effective device strategy

Again, your user categories may be different to our example, as will the granularity of the options you consider and how much you see a need for multiple devices per user. But regardless of how you model your own requirements, we would be surprised if you didn’t find a potential role for pretty much all form factors and classes of device somewhere in your organisation.

And when you see it laid out like this, it helps you to understand where to focus your investments in newer or more advanced options based on firm criteria, rather than purely who shouts the loudest or applies the most political pressure.

Furthermore, the above kind of device-mapping matrix can be easily understood by non-technical business managers. If it’s made available to them, then all equipment funding discussions can take place with a bigger-picture perspective. Again, this is an example of the IT team taking on an enabling role, rather than being forced into a position of having to debate with individual managers and users in isolation, without the benefit of the broader context.

Speaking of the broader context, we have now probably covered enough to move our discussion onto more of a strategic footing.
The big prize: Full workplace transformation

Everything we have discussed so far has the potential to transform the IT-business relationship and how the IT team supports the business in relation to any size of initiative in the end user computing space, even relatively small and tactical ones. The value of this cannot be underestimated, especially given that new requirements and upgrade or migration projects tend to emerge more frequently nowadays.

The big prize, however, is won when IT acts as a catalyst to drive strategic workplace transformation. This is about moving beyond point initiatives to drive positive and fundamental changes to the way people work across the organisation.

Crystallising your strategic objectives

During our research, here are the kind of outcomes we frequently come across from workplace transformation activity. We have touched on some of these already, but it’s useful to list them to focus our minds:

- Boosting of innovation and creativity by enabling employees to freely share and discuss ideas and information, and collaborate effectively to make things happen.
- Streamlining of business processes by speeding and parallelising the flow of documents and tasks seamlessly between individuals and teams.
- Increasing of workforce agility, real-estate efficiency and business continuity through hot-desking and support for secure mobile, remote and home working.
- Reduction of data-related risks by embedding security and compliance into tools and working practices in a natural and non-intrusive manner.
- Delivery of an overall better employee experience to drive greater employee satisfaction and motivation, and to help attract and retain the best talent.
- Creation of a culture that fully embraces openness and change, and proactively looks for opportunities to exploit technology for business advantage.

We could add to this a range of spin-off benefits such as a reduction in travel and energy costs, a lowering of IT operational overheads, and an ability to serve customers better and faster. If we were to highlight the most pivotal objective, however, it would be the last one on the above list to do with organisational culture.

With the right cultural transformation, everything else becomes much easier and more effective. Conversely, without it, you will always be limited in how much you can realise the true potential of modern digital workplace technology.

But achieving cultural change is never quick or easy. It needs to be driven from the top, with relevant systems and policies in place to encourage new behaviours and habits more broadly across the workforce.

IT as a strategic transformational catalyst

Many books have been written on strategic change management, and many highly qualified consultants exist who are geared up to help you with major change initiatives and cultural transformations. We therefore clearly aren’t going to be able to do full justice to this topic here.
Having said that, as most major initiatives in business nowadays involve some kind of technology component, the IT team often finds itself in a position to have an influence and act as a catalyst. This is good for both the business and for the IT team itself - being seen as a positive and proactive force boosts your credibility, makes it more likely that your views will be heard, and your judgement trusted, and significantly increases the chances of budget and funding requests being approved in general. Put simply, life in IT becomes easier and more enjoyable, and it’s always good for morale when you can make a genuine difference.

With this in mind, here are some things to bear in mind in relation to digital workplace transformation:

**Facilitate the vision**
Help executives and business managers to build a collective vision for the digital workplace. Part of this will be educating them on the ‘art of the possible’, i.e. how technology advances can not only open up new opportunities, but also allow familiar problems to be tackled in entirely new ways. A tactic you can use to help crystallise thoughts is the development of a ‘digital workplace manifesto’ – this is about documenting what users and stakeholders can expect if the vision is fulfilled.

**Bring people together**
Beyond strategic visioning, there are many aspects to building a modern digital workplace, and most of them will involve drawing on expertise from across the organisation. The interplay between technology, mobility and location independence feeds into the discussion of how the businesses optimises its use of real-estate, so strike up conversations early with facilities managers and finance executives on this. Technology that changes working patterns and behaviours might radically impact the nature of some employees’ roles and skills requirements, and possibly even have health and safety implications. Again, make sure the right people are involved in planning activity, in this case HR, training managers, and so on. And, of course, let’s not forget the users themselves. When you are sitting around a meeting table or looking at a distribution list or members of a virtual team, stop and ask if there is anyone missing who should be included.

**Use your (collective) eyes and ears, and build relationships**
Make a point of knowing what’s going on in various parts of the business. Have key people from the IT team go walkabout from time to time – drop in, ask questions, provide advice and generally build relationships. In particular, pay special attention to those all-important technology enthusiasts and power users – they can help you a lot with motivation, reassurance and close-proximity assistance of colleagues during rollouts of new facilities and upgrades. They can also be a great source of ideas and an early-warning alarm when users are having repeated problems (people will complain to them before they call the helpdesk). And for your own ideas, they represent a good bouncing board to get fast and informed feedback. Overarching all of this, just being seen to be ‘out there’ builds familiarity, respect and trust, so when you have to take a firm line on something, for example, you are much less likely to get push-back or be ignored.

**Ensure people know and are able to act on what’s expected of them**
Building on the earlier discussion of adopting an ‘enabling’ mindset within IT, an important aspect of this is getting those in the business to take responsibility for the decisions and actions they take. This could be to do with matters of security, compliance or some other aspect of technology use. Make sure policies are not...
just written down, but adequately socialised and understood. Provide training and self-service help, and monitor how effectively things are working so you can make adjustments as necessary. And as a final tip in this area, talk to your business managers and executives and get them to lead by example. If people see their boss collaborating, sharing, running meetings electronically, and abiding by security and other policies, they are much more likely to follow suit.

There’s a lot of other advice we could provide, but the above are the areas where we most frequently see IT teams overlooking the opportunity or working sub-optimally. Pay more attention to these and IT really can become a strong force for change.

Making it happen

Whenever you are dealing with matters of people, mindsets, culture and organisational politics, there’s never a single ‘right way’ to do anything. With this in mind, our aim in this paper has primarily been to illustrate how you can think about and approach the various aspects of digital workplace transformation in an objective, structured and effective manner. The ideas we have presented are based on some of the most common problems, opportunities, strategies and tactics seen in the real world of mainstream business, but should be regarded as input into your own review and planning activity, rather than some kind of prescriptive approach.

That said, if you need a starting point for formulating a practical plan, there is a flow of activity that from experience represents a natural way to progress for many of the IT leaders we speak with (Figure 8).

As implied by above graphic, many activities are iterative and necessarily overlap. And of course, the nature of this area is such that nothing can ever be written in stone. Given the dynamics we have highlighted, your strategy and plan will need frequent review. This is one of the reasons why forming a governing body is a good idea; when new demands or constraints arise, you need to consider them from all relevant angles.

With that, we hope our paper has stimulated some useful thoughts, and wish you every success in creating the best digital workplace for your organisation.
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