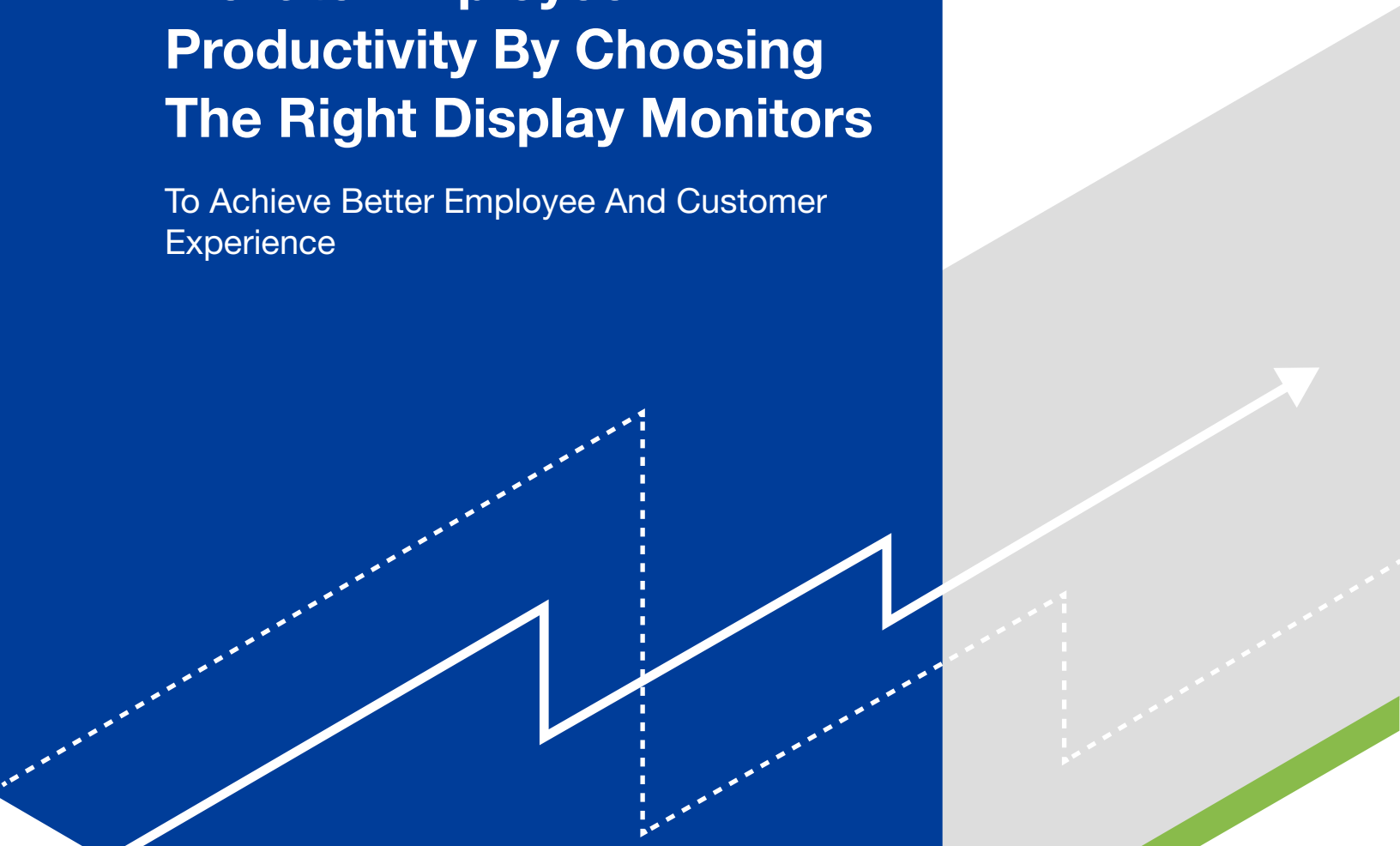
A Forrester Consulting
Thought Leadership Paper
Commissioned By Dell

April 2018

Elevate Employee Productivity By Choosing The Right Display Monitors

To Achieve Better Employee And Customer Experience



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Project Director:
Sri Prakash Gupta,
Market Impact Consultant

Contributing Research:
Forrester's eBusiness & Channel Strategy research group

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Ensure a positive employee experience to better deliver exceptional customer experience.

Sixty-two percent of respondents cite more immersive, better resolution monitors as the top driver for improving their productivity.

Employees' expectations will vary based on their work habits or job description — choose the right display monitor to match employee needs.

Executive Summary

As companies of all types and sizes struggle to survive and thrive in highly competitive markets, increasing employee productivity can provide a crucial edge. Even small gains, multiplied across all employees, can drive considerable growth. The less quantifiable benefits can be even greater, as happier, more productive employees are far more likely to deliver exceptional customer experiences — a key to success in the age of the customer.

In December 2017, Dell commissioned Forrester Consulting to evaluate the role of display monitors on employee productivity and the ability of firms to improve employee experience. Forrester conducted in-depth, quantitative surveys with 355 respondents, including knowledge workers and hardware procurement decision makers at organizations with 5,000 or more employees. The custom survey was conducted in ANZ (Australia, New Zealand), China, India, Japan, North America, South East Asia, and the United Kingdom.

The bottom line: Employees want their voices heard in deciding on the technology that will make them more productive, and they believe improving their hardware (PC, monitor, peripherals) will increase productivity the most. What type of hardware? Among all options, respondents cite a more immersive/larger/better resolution monitor as the top driver for improving their productivity.

Firms typically have standard policies on workforce technology refreshes, but displays are too often overlooked. Survey results are clear — to better attract and retain top talent, IT and infrastructure teams must provide more choices on devices and monitors. But the benefits don't end there. Determining an optimal monitor refresh strategy that considers employee roles and work habits can fuel improved employee experience and, in turn, better customer experience.

KEY FINDINGS

- **IT priorities must better reflect employee expectations.** Seventy-five percent of surveyed respondents want their voices heard in choosing the technology that will make them more productive. However, only 42% of respondents believe improving employee productivity is a critical or high priority for their IT department.
- **Organizations must be flexible to address the needs of different groups.** Existing workforce enablement policies don't reflect the working habits and requirements of different employee groups. Your firm likely has a mix of deskbound employees, highly mobile staff, and everything in between. A one-size-fits-all approach to sourcing display monitors won't adequately address their differing work habits.
- **The right display monitor will increase employee productivity.** Employees have an appetite for larger, higher-resolution monitors that enhance multitasking and content creation, improve user comfort, and allow for viewing more work on their screen. In fact, 80% of respondents believe that a larger display monitor would positively affect their work performance.

A well thought-out display monitor strategy is crucial for improving employee productivity.

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Existing Workforce Technology Strategies Do Not Meet Employee Needs

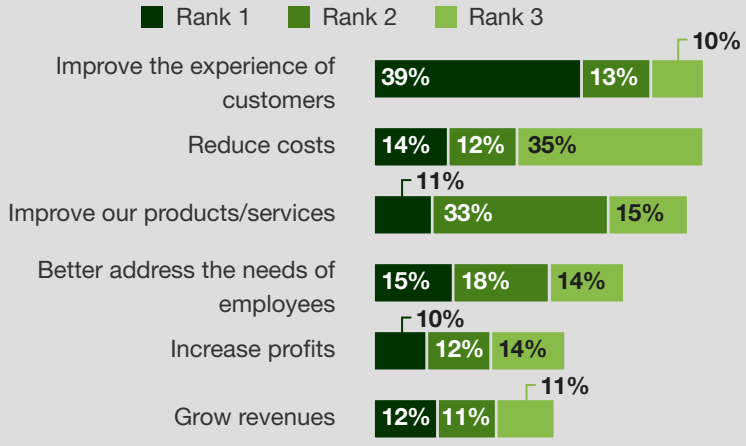
Forrester's customer experience (CX) research demonstrates that CX leaders grow revenue four to 10 times faster than CX laggards. CX leaders are also far more likely to apply CX disciplines and approaches to improving employee experience (EX), including increased investments in employee-facing technologies. Why? Because these leaders know that CX is ultimately in their employees' hands.

Enabling your workforce with better technology must therefore be part of a broader strategy to foster high performance and increase engagement. Engaged employees willingly invest their time and energy in your business success. Providing them with a clear vision of how they can improve customer outcomes is critical, but not enough. Firms must deliver the right productivity tools to ensure employees can get their work done better and faster. Yet how often do organizations prioritize to equip their workforce for success?

Results from the survey we conducted for this study illustrate a chasm. Sixty-two percent of respondents understand the importance of CX and view improving CX as one of their firms' top three business priorities over the next 12 months. But improving EX is a distant fourth — cited by only 47% of respondents (see Figure 1).

Figure 1

"Which of the following initiatives are likely to be your organization's top business priorities over the next 12 months?"
(Showing results for top three ranks)



Base: 355 professionals from FSI, healthcare, government, and media & entertainment industries across seven countries/regions
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, March 2018

Improving customer experience is a top priority for most organizations — but employee experience still lags.

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This disconnect between CX and EX as strategic priorities negatively impacts employee productivity — only 30% of respondents feel highly productive in their work environment. In a highly competitive market, this is a clear red flag.

The good news? Employees know what they need to be more productive. They need technology that helps them:

- **Get more done in the same amount of time.** Our research shows that what makes employees happiest at work is getting things done — making steady progress with their work every day. In fact, 91% of respondents define productivity specifically in terms of increased efficiency (see Figure 2).
- **Collaborate better.** In today's enterprise, very few employees work in isolation. That explains why 78% of respondents consider better collaboration a key to improved productivity. Technology is a key enabler. Survey results show that more than 55% of meetings depend on technology to connect participants — meeting via video conferencing using large display monitors and/or audio conferences.
- **Work faster.** Your employees are keen to work faster without compromising on quality, as noted by 75% of respondents. Successful organizations are embracing this opportunity to empower their employees and better meet business goals.

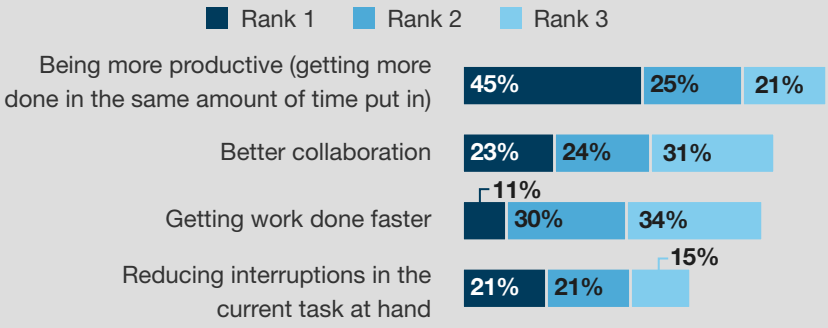
Employee experience begins and ends with productivity.

THE TECHNOLOGY MANAGEMENT CONUNDRUM

The primary job of infrastructure and operations (I&O) professionals responsible for workforce technology is to provide employees with the tools and technology they need to efficiently do their jobs. But all too often, I&O pros fail to deliver. Why? Workforce technology investments are often viewed as a cost and risk center rather than a tool for improving employee experience.

Figure 2

"Optimizing employee productivity is an important goal. What does being productive at work mean to you?" (Showing results for top three ranks)



Base: 355 professionals from FSI, healthcare, government, and media & entertainment industries across seven countries/regions
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, March 2018

Productivity means different things to different employees – plan accordingly.

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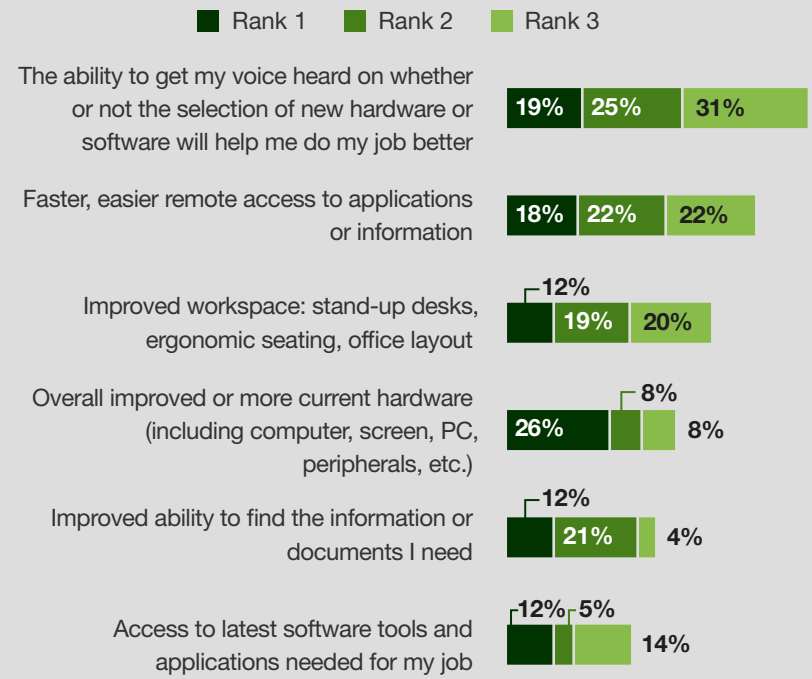
Far too frequently, the technology you've equipped your workers with hinders their productivity.[1] Results from our study highlight that:

- **IT organizations still focus on "keeping the lights on."** Seventy-six percent of respondents believe that IT assigns a critical or high priority to reducing employee downtime. That's the good news. The bad news? This doesn't always translate into improved employee productivity — or improved employee experience. Only 42% of respondents believe their IT department views improving employee productivity as a critical or high priority. Even fewer (25%) believe that the introduction of new hardware for employees is a critical or high priority.
- **Employees want an improved experience.** The inability of IT to meet rising employee expectations is hindering productivity. Employees are aware of the problem. In response, 75% of survey respondents want more of a say in choosing hardware or software (see Figure 3).

Figure 3

"Using your best estimate, please select the top three factors that would positively impact your productivity." (Showing results for top three ranks)



Base: 355 professionals from FSI, healthcare, government, and media & entertainment industries across seven countries/regions
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, March 2018

Employees expect more from their firms — IT must step up to deliver.

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Your Employees Have Different Work Habits — And Display Monitor Requirements

While most knowledge workers believe that working on a larger, higher-resolution monitor would positively improve their productivity, very few have the freedom to choose for themselves. Instead, firms typically adopt a one-size-fits-all approach. The reality? Your employees have unique workforce technology requirements based on their working habits (see Figure 4):

- **Desk-centric employees need comfort and usability.** Typically, this includes administrative staff, receptionists, business operations, and human resources. They spend more than half of their time at their desk and spend less than 4 hours per day in meetings. To stay productive, they need large and/or dual monitors for multitasking — 77% want larger monitors to view more work, and 68% want improved resolution to view images in greater detail.

  Since they spend so much time at their desks, it's also not surprising that desk-centric employees are keen to better utilize their active workspace — 57% want less clutter via improved cable management/ fewer wires, including computing devices with docking environments.

- **Corridor warriors need to transition seamlessly when multitasking.** Typically, this includes managers, high-level executives, and specialists such as doctors and nurses. They move constantly within their place of work — at least three times per week — and spend more than 5 hours per day in meetings. To maximize productivity, they need tools to enable seamless transition between meetings and their desk; reliable connectivity on the go; and convenient, light portable devices that don't compromise productivity.

  A disproportionate number of corridor warriors (45%) are between ages 19 and 34, and they expect the ability to multitask at all times. But this isn't limited to millennials: 87% of all corridor warriors consider multitasking on a single large display (such as ultra-wide or curved monitors) to be a critical or very important attribute. Why? Because 80% of corridor warriors work on at least five or more applications in a typical workday, forcing them to switch between different applications to get their work done.

- **On-the-go professionals need portability and flexibility.** Typically, this includes sales and insurance reps, event managers, and service professionals such as consultants and healthcare services workers. They are most likely to be in customer-facing roles, with 62% using sales/marketing applications (CRM), highest among all respondents. They are also highly mobile — 45% work while commuting at least three times per week, also highest among all respondents. On-the-go pros prefer a dual monitor setup that allows them to expand their screen real estate to significantly increase their productivity during the short period of time they are not on the road. In fact, 49% are already using more than one display monitor — highest among all respondents. They need dual monitors to efficiently multitask across multiple applications, particularly when working with large volumes of customer data. They also need convenient, light, portable devices and self-sufficiency to work, collaborate, and share presentations.

Since they are most likely to travel to multiple corporate offices and customer sites throughout the day, they also expect freedom of choice for both devices and hardware. This includes the need for portable display devices for presenting information and staying connected.

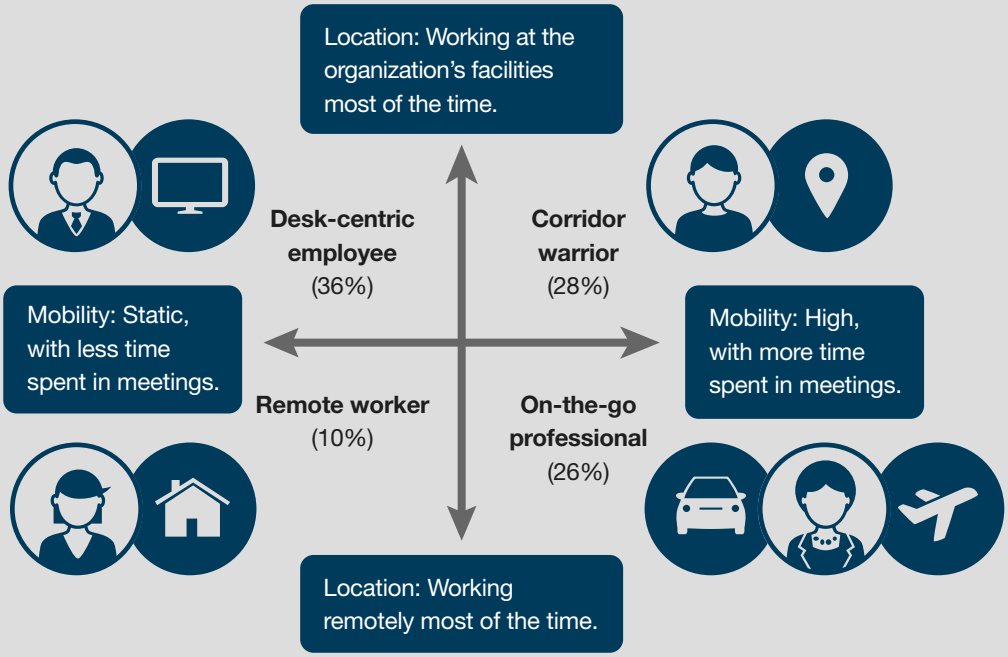
› **Remote workers need comfort and ease of support.** Typically, these employees work at least three times per week outside of the office — mainly at home but also other locations. Seventy-eight percent of remote workers are using single display monitors at their main workstation; unfortunately, they are most likely to have older, smaller monitors (less than 20 inches). To stay productive, they need larger, higher-resolution monitors; seamless connectivity to the core office via telephone or video conference; a suite of tools that enable self-sufficiency; and access to extra IT support.

They also expect a mix of portability, comfort, and ease of use — 50% value fewer cables to effectively manage their workspaces, highest among all respondents. Like corridor warriors, remote workers prioritize the ability to multitask on a single, large display. More than any other employee role, they also prioritize improved connectivity to peripherals (such as a docking station) — not surprising given their often-limited access to IT support.

Figure 4

The future of work is changing rapidly — and so is your workforce.

There are four types of employees who primarily exist today.



Base: 355 professionals from FSI, healthcare, government, and media & entertainment industries across seven countries/regions
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, March 2018

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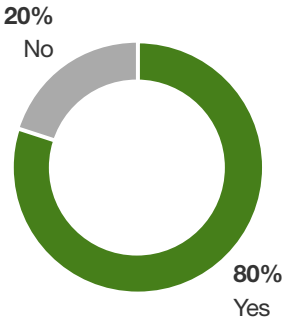
Display Monitors Are A Key Driver Of Employee Productivity — Choose Carefully

Evaluating employee needs based on differing work habits is crucial to an effective workforce technology sourcing strategy. But despite the differences across employee roles, there is a core set of capabilities that all employees value, including:

- **Larger screen size.** All survey respondents in our study using a single monitor have less than 25 inches of screen size. But most would like more.
  - Eighty percent of respondents believe that a larger display monitor would improve productivity (see Figure 5).
  - Eighty-four percent believe that being able to view a great deal of work on a large display monitor is important for their work.
- **Support for multitasking.** Instead of swapping between applications and/or documents, employees prefer to focus on their primary tasks by having all required content readily visible. In terms of activities employees wish to better perform concurrently to their main task, respondents cited checking and responding to emails and working across multiple documents as their top two choices. More specifically:
  - Sixty-one percent of respondents cite the increased ability to multitask as a top consideration for selecting a new monitor (see Figure 6).
  - Eighty-five percent believe support for multitasking would reduce the time required to gather information from multiple sources, applications, and/or files.
  - Ninety-one percent believe that the ability to see multiple windows to allow multitasking on a single screen is important for their work.
  - Eighty-six percent believe a dual-display monitor is important for their work.
- **Higher resolution.** When asked to rate the key benefits of a high-contrast and high-resolution (such as High Definition, Full High Definition, Ultra High Definition) display monitor, 62% of respondents said their productivity would improve with more immersive, larger, better resolution monitors. Digging deeper, we found that:
  - Ninety-one percent of respondents cited a decrease in eye strain as a key benefit versus working on low-resolution monitors.
  - Seventy-nine percent believe the ability to view extremely sharp images with a high level of detail is important for their work.

Figure 5

"Do you think working on a larger display monitor would positively affect your work performance?"
(Select one)

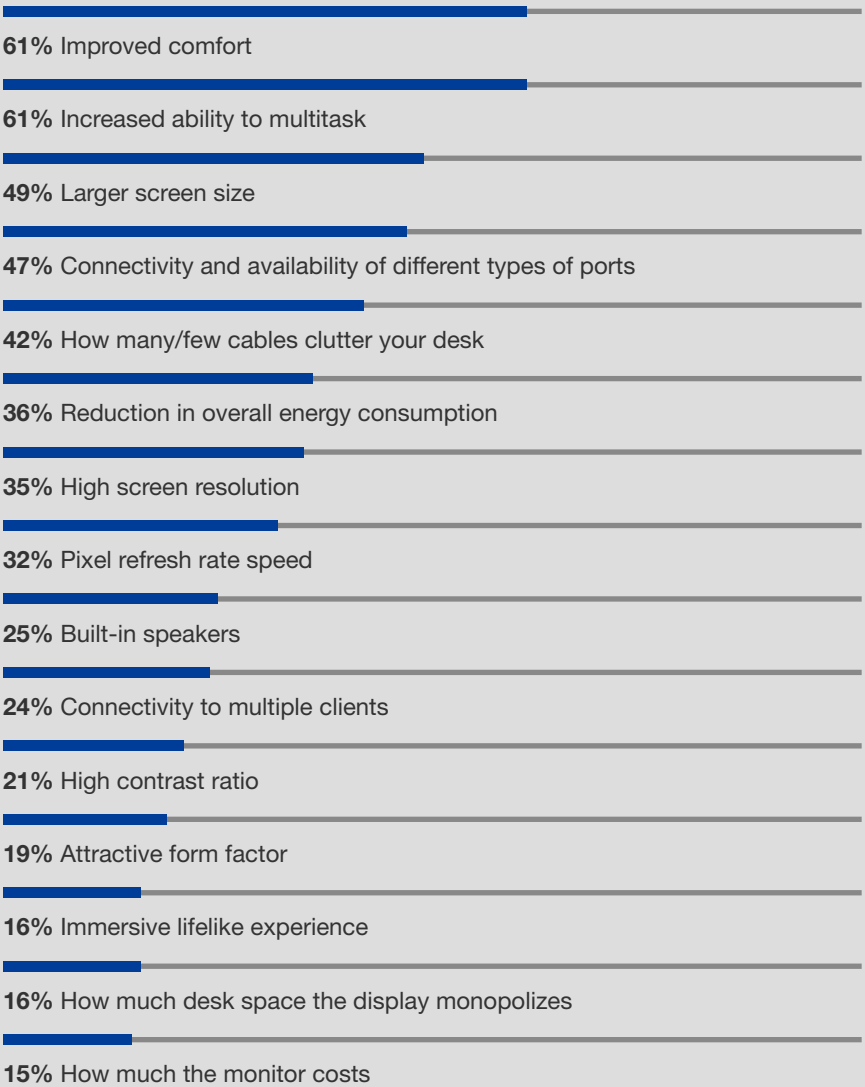


Base: 203 professionals from FSI, healthcare, government, and media & entertainment industries across seven countries/regions
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, March 2018

- **Clutter-free work area.** Sixty-one percent of all survey respondents cited improved comfort as the top consideration when selecting new display monitors (see Figure 6). Results show that:
  - Seventy-three percent of respondents believe that improved cable management or fewer wires for a clutter-free desk is important for their work.
  - Fifty-two percent believe that a single large display monitor is beneficial for better workspace management and less clutter with fewer cables.

Figure 6

"If you had the choice of a new display monitor for your PC, which of the following would you consider?"
(Showing aggregate results for top five ranks, but not all responses shown)



Base: 355 professionals from FSI, healthcare, government, and media & entertainment industries across seven countries/regions
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, March 2018

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Key Recommendations

To deliver exceptional customer experience, your employees must be engaged and productive and feel valued. A well thought-out display monitor strategy is crucial for improving employee productivity. But traditional technology refresh strategies are not enough. Instead, you must:

Tailor your approach to selecting monitors. Understand the core set of monitor capabilities that all employees value for improved productivity. But also consider the needs, wants, and expectations of different employee groups. Start by assessing your employees' current usage patterns to identify key technology requirements and expectations in areas like screen size, resolution, and breadth of color palette supported.

Future-proof your display monitor strategy. Consider capabilities that ensure employees' ongoing productivity as workforce technology continues to advance — and employee expectations continue to rise. Examples include faster refresh rates to support compute-intensive applications and fast, reliable connectivity to provide a clutter-free desk (e.g., USB-C).

Embrace a predictable refresh process. Employee needs and expectations will change over time — manage your monitor refresh cadence appropriately. Forty-seven percent of respondents would like to refresh/update their monitors at least every three years, yet most are still using small screens, indicating older displays or a mismatch with their hardware expectations. Embrace continual innovation and constant technology evolution as part of your monitor refresh strategy. Seek partners for guidance when considering major display monitor purchases/refreshes.

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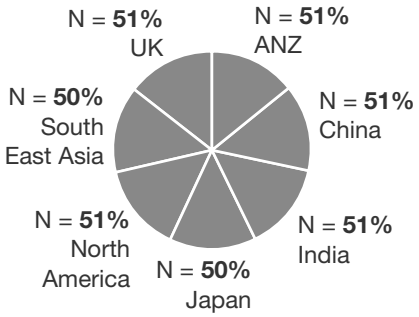
Appendix A: Methodology

In this study, Forrester conducted an online survey of 355 knowledge workers and decision makers across four industry verticals within seven countries/regions to evaluate the role of display monitors on employee productivity.

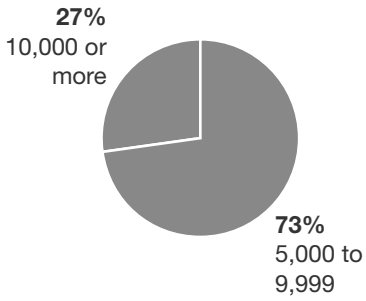
Survey participants included decision makers and knowledge workers who were at manager level or above from various job functions. Questions provided to the participants asked about their views on large display monitors and buying behavior for display monitors. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in December 2017 and was completed in March 2018.

Appendix B: Demographics/Data

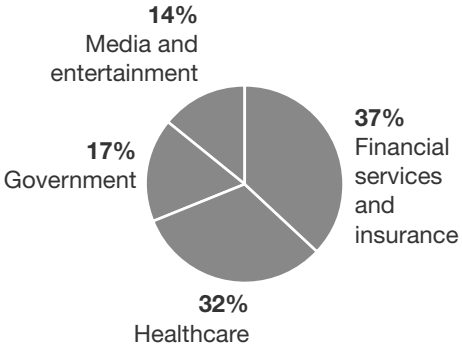
Survey country



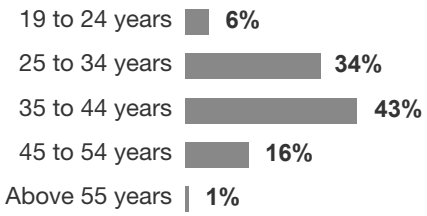
Company size (worldwide employees)



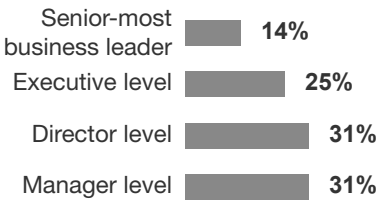
Target industry



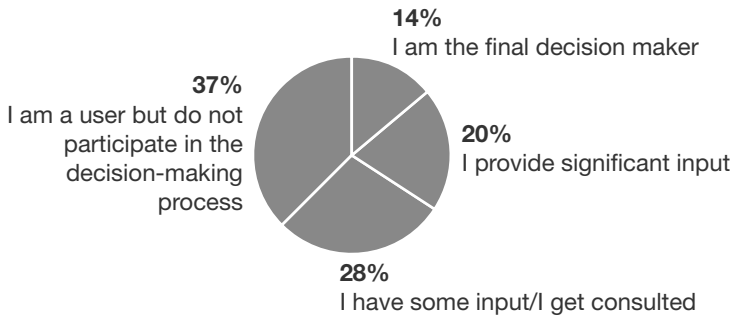
Respondent age



***Respondent seniority**



***Level of decision making and involvement in IT hardware procurement decisions for organization's workforce**



Base: 355 professionals from FSI, healthcare, government, and media & entertainment industries across seven countries/regions
*Note: Percentages may not total 100 because of rounding
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, March 2018

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Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"Build Digital Workspace Delivery Systems To Give Employees The Right Tool For Their Jobs," Forrester Research, Inc., March 6, 2017.

"Customer Experience Drives Revenue Growth, 2016" Forrester Research, Inc., June 21, 2016.

Appendix D: Endnotes

[1] Source: "Engineer Your Technology Environment To Improve Employee Productivity And Flow," Forrester Research, Inc., December 15, 2017.