

A Forrester Consulting
Thought Leadership Paper
Commissioned By Google
September 2018

Rethink Employee Segmentation For A Cloud- Native World



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Workforce segmentation is essential to supporting collaboration, productivity, and a positive EX.



Segmentation strategies that account for cloud experiences ensure success in a cloud-first future.

Executive Summary

A positive employee experience (EX) — employees' perception of how well their organization's culture, structures, and tools keep them satisfied and engaged in their work — has a meaningful impact on business outcomes. To promote EX, organizations need a technology strategy that supports employees' abilities to be productive and remain connected with the information and people they need. A systematic approach — one that allows organizations to harness new technologies and support unique and evolving employee workstyles — is essential.

In March 2018, Google commissioned Forrester Consulting to evaluate how organizations are segmenting their workforce for technology needs and how cloud services and evolving employee preferences are shaping these decisions. To explore this topic, Forrester leveraged global survey data from a May 2018 Forrester Consulting study commissioned by Google called "Rethink Technology In The Age Of The Cloud Worker," as well as Forrester Technographics® data. To supplement the surveys, Forrester conducted five interviews with IT decision makers at companies that have deployed cloud apps for employees and are segmenting their workforce for technology needs. Our research revealed that one-size-fits-all approaches to workforce technology are falling out of favor, giving way to worker segmentation. However, leaders must move beyond traditional strategies to ensure success in a cloud-first future.

KEY FINDINGS

- › **Workforce segmentation is an opportunity to improve EX.** IT leaders appreciate that to promote an environment where employees feel productive and innovation can take root, they need modern workforce technology. But not all workers have the same needs. A disconnect between needs and tools can lead to employee frustration and collaboration friction. Therefore, 70% are segmenting their workforce for technology decisions, typically along functional lines.
- › **Traditional segmentation strategies are not optimized for modern workers.** Workforce technology must keep pace with modern workers who rely on mobile workflows, demand instant access to information, and collaborate with geographically distributed teams. An emerging and valuable segment of workers, Cloud Workers, who spend a large portion of their days working on web browsers, are even more discerning. Organizations need a way to identify and support the unique collaboration needs of today's workers, particularly Cloud Workers, but blind spots can cause traditional strategies to fall short.
- › **Cloud-informed segmentation strategies deliver key benefits.** The cloud has become a business-critical asset that will continue to shape how employees work and serve customers in the future: 81% of organizations are taking a cloud-first strategy or are prioritizing the use of cloud for new business apps. Segmentation strategies need to align with organizations' cloud agendas. Prioritizing cloud-native experiences for specific employee segments delivers important benefits to employees and the business, including scalability, simplified information access, reduced costs, and improved security.

Employee Segmentation Is Key To Maximizing The Value Of Technology

Enterprises compete on their ability to harness their human capital to create differentiated experiences for customers. Companies must not overlook the role that employee experience — the sum of employees' perceptions of their experiences working within an organization — plays in this effort.¹ Prioritizing EX is not just a nice thing to do — it leads to better business outcomes, including better customer experience (CX), lower employee turnover, and stronger financial performance.²

EX is an employee's perception of how well their organization's environment, culture, tools, and support structures keep them satisfied and engaged in their work and allow them to achieve and exceed their goals.

Workforce technology strategies can make or break EX. Done right, they promote a high degree of collaboration and productivity — elements that make employees feel happy and engaged in their work. Technology decision makers recognize this connection. In our interviews, we found:

- › **Collaboration plays a bigger role in technology decisions . . .** Many firms have not historically given collaboration, and the technology to support it, the focus it deserves. However, several interviewees described a cultural shift that is ushering in sweeping change. Driven by the availability of new tools and support from the highest levels of the organization, firms are increasing their investment in mobile and social collaboration technologies, which they credit for breaking down communication silos that once slowed access to valuable information and insight.
- › **. . . paving the way for innovation to take root.** Information work requires a lot of brain power. Innovative thinking is fragile; conditions must be just so. Decision makers strive for a workforce technology strategy that creates a foundation on which this creativity can flourish.³ One technology executive described his goal to maximize the probability of a “black swan”: “**Black swans are events that are unexpected, low probability, but have a huge impact. You need to create platforms that maximize the probability of black swans to take place. The key to that is cooperation and diversity. Try to have systems that allow all sources of knowledge to be embedded in them and people working transparently.**”

“We’re reinventing the company culture as far as how we work, how we collaborate. We’ve implemented some really good systems that have allowed us to open up a lot of closed areas of the business to many more people.”

IT director, US wholesale company



“Almost everything is sharable, everything is collaborative. Especially [since] social media has come into play, the dependency on email and siloed communication has come down significantly. Collaboration is evolving along with new tools.”

IT director, US consumer packaged goods company



COMPANIES ARE SEGMENTING THEIR EMPLOYEES FOR TECHNOLOGY NEEDS — TYPICALLY ALONG FUNCTIONAL LINES

Technology leaders appreciate the link between EX, technology, and business outcomes. Seventy-three percent consider EX a top priority in decisions about which devices and business applications to deploy for employees. Given that technology needs vary by organization, department, and even work context, it is encouraging to see that decision makers have largely abandoned the one-size-fits-all method.⁴ In fact, firms that issue the same standard device to every user are the minority (see Figure 1).

Instead, organizations are predominantly using a functional role-based segmentation approach, whereby certain roles receive a setup based on IT's understanding of their needs. Except for nontraveling sales or call center personnel who are most likely to receive a desktop, organizations are likely to issue mobile devices as the standard across roles. Most issue laptops to the typical information worker, executives, and travelers. While mobile devices are the new normal, there is little variety in mobile device types. Roughly half equip executives and traveling sales professionals with smartphones, but fewer than half provide other mobile devices beyond a laptop (smartphones, tablets, thin/zero client) as the standard to other roles.⁵

“You have a sales and marketing setup, you have an executive setup. Everybody else has a standard imaged laptop that’s configured the same way. . . . That would be the standard . . . a balance of all things, to try and satisfy everybody.”

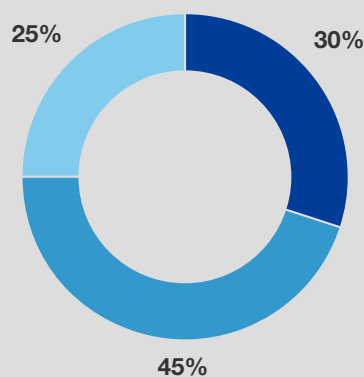
IT director, US wholesale company



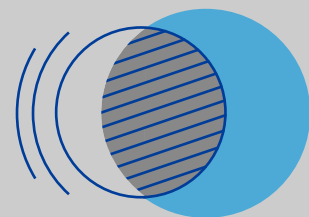
Figure 1

“Which of the following best reflects your company’s current approach to selecting company-owned laptops/workstations for the workforce?”

- Every user is provided a standard laptop/workstation based on our current specs and options at a given time
- Most users are provided with standard models; a small portion are provided with special equipment for their needs
- We segment employees into several groups based on the technology demands of their job role and support a variety of laptops/workstations for employee segments



70% of organizations are segmenting employees for device needs.



Base: 1,060 global enterprise technology decision makers who oversee workforce devices and cloud applications
 Source: A commissioned study conducted by Forrester Consulting on behalf of Google, February 2018

Traditional Segmentation Approaches Are Not Optimized For Modern Workers

Interviewed decision makers generally agreed that functional role is a suitable way to segment their workforces, especially since they rarely receive employee complaints. However, the autonomous and complex nature of knowledge work can make it difficult for IT pros to see employee friction points.⁶ A lack of complaints is not the same as satisfaction. Misalignment exists between the type of devices information workers use for work and the ones they would prefer to use if given the choice (see Figure 2).⁷ Further, only a third of employees feel satisfied with the number and quality of apps their companies provide.⁸

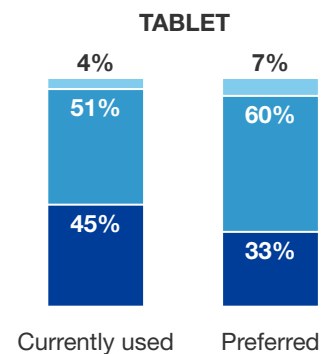
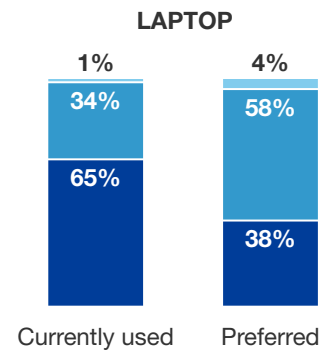
The gap between IT's perceived effectiveness and employee reality suggests that organizations can and should do more to refine their segmentation approaches. What may have worked in the past is no longer sufficient. Today's workers:

- › **Are mobile.** The mobile mind shift has permeated employee work styles.⁹ Access to effective mobile tools are a necessity; 94% use their laptop, tablet, smartphone, or wearable device for work while commuting, traveling, or at home.
- › **Demand instant access from a variety of sources.** The value of information has a shelf life: Extracting knowledge quickly is important. Eighty percent of information workers say that they need instant access to information from a variety of sources to be successful, and 68% seek the ability to access work files and apps from anywhere, on any device. They are comfortable switching between devices to satisfy these needs, particularly as cloud technologies have allowed for a continuous experience across endpoints.¹⁰
- › **Are collaborative.** On average, workers spend half of their days on collaboration tasks (see Figure 3). Collaboration not only makes up a large portion of their days, it is complex. In a typical week, they're interfacing with an average of 36 collaborators, and a large majority collaborate with colleagues in different locations daily. It comes as no surprise that 71% describe technologies that help them collaborate with colleagues as critical to their success.

Figure 2

Employees' current work devices do not align with their preferences

- Not sure
- Other type (ultrathin, touchscreen, web-based, mini, etc.)
- Regular/traditional



Base: Variable; global information workers at enterprise firms
 Source: Forrester Analytics Global Business Technographics® Workforce Benchmark Survey, 2017

Figure 3

Collaboration is more important than ever



Employees are spending an average of 50% of their day collaborating directly with others



With 36 weekly collaborators, on average



81% collaborate daily with coworkers in a different location



Base: Variable; global information workers at enterprise firms
 Source: Forrester Analytics Global Business Technographics® Workforce Benchmark Survey, 2017

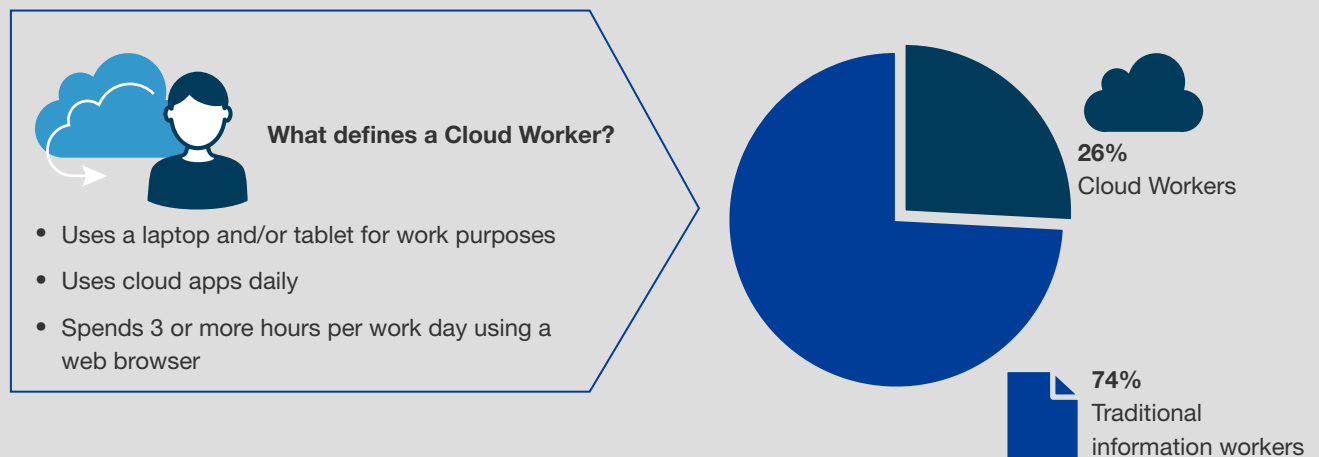
TRADITIONAL STRATEGIES RISK MISSING A GROWING SEGMENT IN THE WORKFORCE: CLOUD WORKERS

As workers have gained access to a variety of web-based applications — email, office applications, intranet sites — the browser has become a central access point for communication and collaboration. This trend has propelled a new segment of workers — Cloud Workers — to emerge (see Figure 4). Cloud Workers use cloud apps for work daily and spend an average of 4.6 hours per work day using web browsers. These workers can be found everywhere, across geographies, industries, and functions — from strategic, corporate roles like marketing or product engineering to customer-facing roles like sales and operations.

Cloud Workers are at the forefront of a wider trend toward flexible workstyles and real-time collaboration. Even more than traditional information workers, Cloud Workers desire tools that allow them to work from anywhere, feel comfortable storing their files in the cloud, and enjoy switching between different devices for work. They represent a valuable segment of workers that can pave the way for innovation elsewhere. Organizations must identify and support them, but because they are not neatly contained within functional roles, traditional segmentation strategies risk missing them.

Cloud Workers are a valuable segment of workers at the forefront of a wider trend toward flexible workstyles and real-time collaboration.

Figure 4

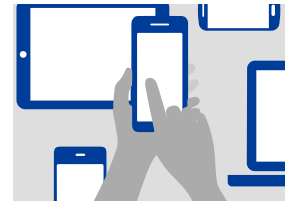


Base: 468 global information workers who use cloud apps at least weekly for work
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, February 2018

BLIND SPOTS LIMIT SEGMENTATION EFFECTIVENESS

Segmentation strategies must evolve to meet the needs of modern workers, particularly Cloud Workers. However, four common blind spots inhibit success. Left unchecked, these blind spots can create misalignment between job demands and resources, which can in turn lead to work disruptions, employee frustration, and collaboration friction.¹¹ These blind spots include:

- › **Too little input from players across the enterprise.** EX is a companywide effort; IT leaders cannot affect change alone. HR leaders need to work with IT to ensure that employees have the right devices for their needs when they start. Marketing leaders need to understand how employee technology works with customer-facing technology.¹² But this kind of cross-departmental collaboration can be difficult to come by as one IT director explained: “We need a clear understanding of how the person’s going to work before they start. [HR] may say, ‘Someone for sales, someone for marketing,’ but there’s no real detail behind the position. We’re doing two or three times the work trying to figure this out.”
- › **Limited understanding of employee preferences.** The best source of information on which tools are most effective is largely untapped: employees themselves. Few decision makers we spoke with are investing in understanding employee preferences — either by asking them directly, through surveys, through employee journey mapping, or by monitoring device usage — and using that information to shape decisions. Employees need to feel like they have a voice in the decision-making process.¹³ However, many firms make managers the employees’ proxy — if they seek input at all. One CTO admitted: “Very rarely would we go back and say, ‘This is what we put in [for the employee], how’s it going? How can we make things better?’ We realize the importance, but that’s not something that’s done here.”
- › **Too few variables used to inform technology choices.** IT pros make do with what little information they have, which is often functional role alone. While using one dimension to segment is better than not segmenting at all, leaders recognize that needs can vary within roles due to several variables that are not often being considered when making technology choices as one IT director illustrated: “The nature of work for employees varies drastically depending on what they do and their culture . . . and the type of people they are matters; millennials seem to adopt technology much faster.” Organizations must analyze more factors to improve segmentation precision. A deeper understanding of gaps can reveal opportunities to invest in high-need and high-return employees.¹⁴
- › **Imbalance between cost and security priorities and collaboration goals.** IT managers typically see and measure what they are accountable for, such as reducing costs and security risks.¹⁵ This lens can distort their view of employee collaboration needs. While the decision makers we spoke with care about employee productivity goals, security and cost concerns — like endpoint security, regulatory compliance, and limited IT budgets — are top-of-mind. Employees need IT leaders to be their technology advocates, but as one IT director explains, balancing IT priorities with employee goals is a struggle: “Through an auditor or compliance perspective, we’re like heroes, but through a user perspective, not so much.”



About a third of workers say that, on a daily or weekly basis, a technology problem disrupts them, or their work is interrupted because they can’t find or access the information they need.

“One of the biggest challenges has been when [certain employees] would lose more than half of the week just dealing with systems.”

Chief technology officer, UK technology company



Cloud-Informed Segmentation Benefits Employees And The Business

Cloud computing is powering digital transformation across industries and geographies, changing the way employees communicate, collaborate, and serve customers. IT organizations are establishing the foundation for a cloud-native future: 81% take a cloud-first strategy or prioritize the use of cloud for new business apps. Workforce segmentation strategies need to account for cloud experiences to keep pace with these developments. Thankfully, many organizations are heeding the call. Already, the cloud has propelled 61% of enterprises to “significantly” or “completely” transform their approaches to technologies that support employee productivity. And as many as 79% express interest, plans, or current use of cloud-native computers for their workforces.

Prioritizing cloud-native experiences for specific employee segments is important for modern workers because:

- › **The cloud affords employees scalability and simplified information access.** Information workers need access to task-critical information, and they need it quickly. But the amount of data and information that organizations are collecting is growing at an exponential rate — one that is outstripping the capabilities of traditional devices. Cloud services allow companies to scale up based on their needs because the processing power is in the cloud rather than on devices.¹⁶ In addition, cloud-powered services like single-sign on make employees’ lives easier, as one IT director explained: *“Whether you’re inside or outside the company, you don’t have to use three other tools, like a VPN, two-factor authentication, and mapping drives just to get one document to access. People find that to be really productive.”*
- › **Cloud Workers are growing, and they need real-time collaboration.** While 26% of information workers are Cloud Workers, their numbers are likely to grow alongside organizations’ aggressive cloud adoption plans. As this happens, companies will need to offer the types of cloud-powered services Cloud Workers want. While all information workers desire the ability to access work files and apps from anywhere, the ability to collaborate in real time, and browser extensions to support work tasks, Cloud Workers in our research are even more likely to describe these capabilities as important (see Figure 5).

The prioritization of cloud-native experiences for specific employee segments is also important to the business because:

- › **The cloud can keep critical data safe.** Improving endpoint security is a top priority for 69% of IT leaders. Lost, stolen, or compromised devices can have costly consequences for companies including regulatory fines, loss of intellectual property, and damaged customer trust from leaked personal data. Cloud-native devices keep data secure in the data center instead of on devices. They also allow employees to get up running quickly with a new device and full access to their information in the cloud if needed.



81% take a cloud-first strategy or prioritize the use of cloud for new business apps.



79% express interest, plans, or current use of cloud-native devices for their workforce.

“I would be more concerned about having the data on a hard drive, where that data could get lost, or corrupted, in comparison to having it in the cloud, where I know that the data’s safe.”

IT director, US wholesale company



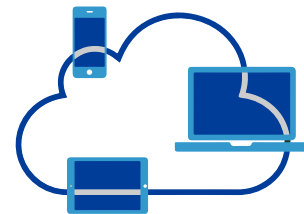
› **Cloud-native devices are less expensive and fast to deploy.**

Thirty-seven percent of IT pros describe rising costs as a challenge to selecting devices that support workforce productivity. However, a device does not need to be expensive to be effective. New cloud-native laptops are available at a lower price than the traditional laptops commonly issued as the standard to information workers. With a lower price, companies can extend devices to those who may not otherwise have access to one. Cloud-native devices can also be fast to deploy, reducing the time IT staff spend on administration so they can focus on more productive tasks. Interviewees acknowledged that some workers — in particular, those who still rely heavily on legacy applications — might be difficult to serve from a cloud-native device today. However, as more applications move to the cloud soon, the segment that could be served by a cloud-native device will grow. In the interim, virtual desktop infrastructure (VDI) is one option for providing browser-based access to legacy apps. With VDI, IT leaders can gradually transition workers onto cloud-native devices while freeing up time and resources to move legacy apps to the cloud. Fifty-four percent of IT decision makers in our research have already implemented VDI, and 23% have plans to adopt in the next year. Further, among those not currently using VDI, 67% would consider supporting VDI if it meant lower costs.

- › **Aligning to cloud-first strategies future-proofs the business.** The cloud has already become business-critical for many businesses, and companies' reliance on cloud will only grow in the coming years. At the same time, employees' power and expectations for the technology to which they have access will also rise — employees will expect that work-provided tools will be at least as good at meeting their needs as the technology they're accustomed to using in their personal lives. Companies that proactively align today's workforce technology decisions with their cloud-first agendas will be better equipped for the heightened business agility and employee connectivity needs of the future. The rest risk costly change management implementations down the road that drain company time and resources and hinder employees' productivity (and in turn, their experience).

“Cloud is changing the way we work. In turn, you have to change the way that you choose devices for employees. That doesn't mean that you're spending the most money on it. Don't just buy PCs because they're selling PCs; make sure that it's the most effective choice.”

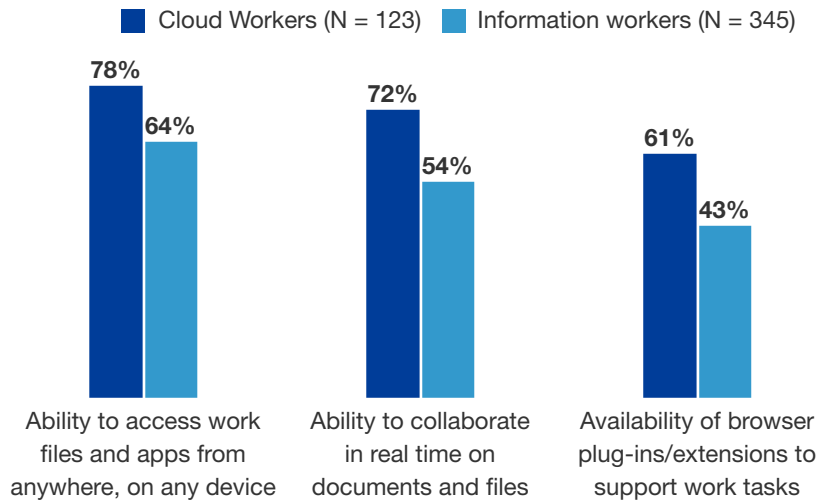
IT director, US wholesale company



54% of organizations have already implemented VDI; another 23% have short-term adoption plans.

Figure 5

“In thinking about the device(s) you use for work purposes, how important are the following capabilities?”



Cloud Workers are even more likely than traditional information workers to describe access to these cloud-powered capabilities as important.

Base: 468 global information workers who use cloud apps at least weekly for work
Source: A commissioned study conducted by Forrester Consulting on behalf of Google, February 2018

Key Recommendations

IT professionals can play a pivotal role in advancing EX at their companies by advocating for workforce technology that meets the needs of security teams and end users. Efforts focused on optimizing workforce segmentation strategies are an avenue to do just that. By gradually modernizing workforce technology in step with how workers are evolving, organizations can better meet the needs of emerging employee groups — like Cloud Workers — without abandoning those of traditional workers. Companies that deprioritize workforce segmentation risk poor EX and costly change management battles in the future. To align your organization with the right side of the divide, follow these five steps:



1. Develop a fact-based approach. Successful organizations use data to develop a deep understanding of their customers' needs. You should apply the same fact-based method internally to better understand and serve workers. This will mean collecting more data through surveys, interviews, employee journey mapping, or monitoring device use. With these tools, decision makers can measure things like how easy or difficult it is for certain employees to find the information they need, as well as openness to using a cloud-native device.



2. Define more variables to inform segmentation decisions. Decision makers recognize that a number of variables influence employee device preferences, yet many default to taking very few into account. Expand the functional-role approach by experimenting with other variables you suspect are influencing employee technology behavior and preferences.



3. Identify the addressable market for cloud tools. When evaluating potential segments for cloud-native devices, exclude workers you estimate would be less suitable. Those doing highly specialized tasks or who spend a large part of their day on legacy apps might be more challenging to transition. For others who have mostly transitioned to cloud-based work, but rely on legacy systems for a few other tasks, consider VDI to bridge the gap and enable these users to benefit from cloud-native devices.



4. Develop a target Cloud Worker profile. Analyze employee data within the addressable cloud segment and look for correlations between interest in using a cloud-based device with other factors to develop a target Cloud Worker profile. Look at the time spent on the browser — a defining characteristic of Cloud Workers in our study. While the target profile will look different in each organization, other factors that may be useful to explore include high collaboration frequency (as measured by full calendars), self-described affinity for new technology (as measured through surveys), and low tenure — people who aren't ingrained in a work routine they're reluctant to abandon.



5. Develop pilot programs to promote cloud-native experiences. Use your target profile to identify Cloud Workers and invite them to partake in cloud-native programs (e.g., device demos, loaner programs, training, communities). Cloud Workers, who can evangelize the benefits of cloud experiences, are a logical first audience for these initiatives, but these programs can also reduce adoption barriers among others, particularly those poised to become Cloud Workers themselves soon: workers who resemble your target profile but may not be fully aware of their reliance on cloud-based work or have considered using a cloud-native device.

Appendix A: Methodology

In this study, Forrester interviewed five IT decision makers from retail, healthcare, manufacturing, technology, and wholesale companies in the US, the UK, and Australia that have deployed cloud applications for employees and that are segmenting workers for technology needs. The interviews focused on understanding their approach to segmenting and the degree to which they believe their strategy supports their workforce collaboration goals. The interview questions asked participants about their ideas for refining their segmentation to meet the needs of different types of workers and challenges that stand in the way of implementing their vision. Interviewees were offered an incentive as a thank you for time. The interviews were conducted in May 2018.

The interviews were supplemented with insights from a 2018 Forrester Consulting study commissioned by Google called “Rethink Technology In the Age Of The Cloud Worker.” The data findings in this study were derived from two online surveys. The first was an online survey of 1,060 technology decision makers at enterprises in nine countries (the US, Canada, the UK, France, Germany, Sweden, Netherlands, Australia, and Japan) and a range of industries to evaluate workforce technology approaches. The second was an online survey among workers at organizations in seven countries (the US, Canada, UK, France, Germany, Australia, and Japan) to understand evolving needs of employees in the cloud era. Respondents in both surveys needed to be current users of cloud services. Questions provided to participants asked about trends related to cloud computing, employee preferences and behaviors, IT support processes, and what employees and IT decision makers value in employee devices and browsers. Respondents were offered a small incentive as a thank you time spent on the surveys. The data studies began in January 2018 and were completed in February 2018.

Appendix B: Supplemental Material

RELATED FORRESTER RESEARCH

“The Employee Experience Imperative,” Forrester Research, Inc., December 15, 2017.

“Everyday Technology Choices For A Better Employee Experience,” Forrester Research, Inc., September 26, 2017.

“Focus On Employee’s Daily Journeys To Improve Employee Experience,” Forrester Research, Inc., April 20, 2018.

Appendix C

ENDNOTES

¹ Source: “Transform The Employee Experience To Drive Business Performance,” Forrester Research, Inc., February 12, 2018.

² Source: “The Employee Experience Imperative,” Forrester Research, Inc., December 15, 2017.

³ Source: “The Best Tech Leaders Develop Creative People For Customer Obsession,” Forrester Research, Inc., February 20, 2018.

⁴ Source: “The Employee Experience Imperative,” Forrester Research, Inc., December 15, 2017.

⁵ Source: Forrester Global Business Technographics® Infrastructure Survey, 2017.

⁶ Source: “Focus On Employee’s Daily Journeys To Improve Employee Experience,” Forrester Research, Inc., April 20, 2018.

⁷ Forrester defines information workers as full-time employees, across roles, who use a mobile connected device for at least 1 hour per work day.

⁸ Source: “Everyday Technology Choices For A Better Employee Experience,” Forrester Research, Inc., September 26, 2017.

⁹ Source: “The State Of Enterprise Worker Mobility,” Forrester Research, Inc., April 21, 2017.

¹⁰Source: “Everyday Technology Choices For A Better Employee Experience,” Forrester Research, Inc., September 26, 2017.

¹¹Source: “Engineer Your Technology Environment To Improve Employee Productivity And Flow,” Forrester Research, Inc., December 15, 2017.

¹²Source: “The Employee Experience Imperative,” Forrester Research, Inc., December 15, 2017.

¹³Source: “Engineer Your Technology Environment To Improve Employee Productivity And Flow,” Forrester Research, Inc., December 15, 2017.

¹⁴Source: “Assess The Capabilities And Impact Of Your Collaboration Technology Toolkit,” Forrester Research, Inc., October 12, 2017.

¹⁵Source: “Engineer Your Technology Environment To Improve Employee Productivity And Flow,” Forrester Research, Inc., December 15, 2017.

¹⁶Source: “The Future Of Digital Workspaces Is Cloud,” Forrester Research, Inc., August 31, 2016.