Digital Value Institute

HOW TO BETTER CONNECT PEOPLE, INFORMATION, AND KNOWLEDGE?

A DIGITAL WORKPLACE ROADMAP

PREPARED AND PRESENTED BY

ATLE SKJEKKELAND, PRESIDENT
THORNTON A MAY, COUNCIL CHAIR

THE DIGITAL VALUE INSTITUTE
- A CXO THINK-TANK TO FAST-TRACK THE DIGITAL LEARNING CURVE

INTRODUCTION

Intellectual historians have coined the term “agnotology” to describe the study of ignorance and how it is produced. They posit three primary drivers of ignorance:

- Not having studied the subject;
- Studying the subject wrong [i.e., sic learning from inaccurate and biased sources]; and/or
- Over-prioritizing the study of one aspect of the subject while neglecting others.

The path to digital transformation is a rich research area for agnotologists. There are some organizations who leap to action without accessing the lessons learned from the many pioneers who have gone before. There are organizations who rely on “hearsay and myth” generated by a rapidly growing digital transformation industry. And there are organizations over-focused on the technologies that are part of the transformation narrative but not the complete story.

The first rule in most disciplines is “Know your turf.” The data from digital transformation pioneers is unambiguous – one of the most important critical success factors is to know your employees - what motivates [and de-motivates] your workforce. Is there an advocate in place to evaluate what every change initiative will do to the employee experience?

It stands to reason that an organization undertaking a digital transformation requires a work environment [workplace] and employee base [workforce] that has been, or is in the process of being, digitally transformed as well.

Much attention has been focused on the technologies associated with creating expectation-exceeding customer experiences. Not so much attention or investment has been allocated to the foundational employee experiences and skill sets that enable such transformed customer experiences.

We hypothesize that organizations will need a Road Map that gets them to a transformed Digital Workplace.

That said, our research indicates NO REAL WIDELY HELD CONSENSUS exists about what exactly that future Digital Workplace might look like.

We asked 500 senior IT executives working in large organizations headquartered in North America; 225 state and local government IT professionals working in the State of Florida and 75 retired operating executives [i.e., non-IT] living in the Northeast:

When You Hear the Phrase, “Digital Workplace”
What is the first Thing / Image that comes to mind?

A variety of answers ensued. Some cited the existing workplaces at pioneering companies like Apple, Google or Netflix. Others pointed to emerging hybrid co-working spaces [e.g., We Work]. Some focused on mobility [i.e., work from every/anywhere – Starbucks, the car while driving or being driven autonomously, National Parks, Baseball/football stadiums, amusement venues, and restaurants].

In the industrial age it was thought [ala the scientific management approach developed by Frederick W. Taylor] that a centrally managed, top down work process was optimal. Today knowledge workers are encouraged to discover their own paths to business effectiveness.

The Digital Value Institute is a new think-tank for identifying how technology is transforming industries and how leaders and organizations can respond. The institute has, together with the following executives, developed this digital workplace roadmap.

Kim Bartley
CMO
White Castle

Paul Gaffney
CTO
Dick's Sporting Goods

Brian Shield
VP IT
Boston Red Sox

John Crooks
IT Division Chair
Mayo Clinic

Tom Murphy
CIO
University of Pennsylvania

Greg Keeling
Director
Bank of Montreal

Yuri Aguiar
Director of Innovation and Transformation
Ogilvy

Curtis A. Carver
VP & CIO
The University of Alabama at Birmingham

Jane Alexander
Chief Digital Information Officer
The Cleveland Museum of Art

Vince Kellen
CIO
University of California San Diego

Michael A. Coleman
VP & CIO
Electric Power Research Institute

Dux Raymond Sy
CMO & MVP
AvePoint

Wesley Rhodes
COO
Kroger - Sunrise Technologies

Jupp Stoepetie
CMO
ABBYY

Louis Steinberg
CTO emeritus
TD Ameritrade

Lisa S. Stanley
CEO
OSCRE International

Stephen Ludlow
VP
OpenText

Javier Cabrerizo
COO
Prosegur

The Institute would also like to thank ABBYY, AvePoint, and OpenText for their input and recommendations. These companies are in the forefront of digital transformation and have helped the institute develop this digital workplace roadmap.

Below are our recommended steps for better people, information, and knowledge.

Yours truly,

Atle Skjekkeland
President, The Digital Value Institute

Thornton A. May
Council Chair, The Digital Value Institute

.

THE BUSINESS BENEFITS

Industry competition may force you to improve your value offerings or to reduce your operating costs to maintain your margins. A digital workplace can better connect people, information, and knowledge. It can improve knowledge sharing, innovation, productivity, and bottom-line performance. Staff wants to continue working for you, which saves you money on hiring and retention in competitive markets.

Excellent customer engagement requires excellent employee engagement, but research by HBR found that three-quarters of those surveyed said that most employees in their organization are not highly engaged. Improving this requires trust in leadership, hands-on management, growth opportunities, meaningful work, and positive work environment. A well-designed digital workplace is therefore a foundation for improving employee engagement, but success is about leadership, involvement, and motivation.

New generations of workers expect the same tools within a business as they use as consumers, and customers in a digital age don´t accept slow and cumbersome customer service. Business at the speed of paper is becoming unacceptable, and the digital workplace can improve operational efficiency and productivity.

The “appification” of enterprise IT over the last few years have created more IT systems and silos that negatively impact the effectiveness of employees. Deloitte’s 2019 Global Human Capital Trends survey found that less than half (49 percent) of the responding business and HR leaders believed that their organizations’ workers were satisfied or very satisfied with their job design. As an example, The average number of systems workers must access as part of their day-to-day jobs has recently risen from eight to 11 (source: Sierra-Cedar, Sierra-Cedar HR systems survey, 2018.) and 27 percent of surveyed workers estimate they lose up to an entire day every week on irrelevant emails and messages (source: Josh Bersin, The employee experience platform market has arrived, May 14, 2019.)

Empty office space is wasted space and money. A digital workplace will enable work from anywhere, which can be used to optimize or reduce the office space required to run the business. Work should be a state of mind, not just a place.

A digital and more efficient workplace may also reduce your carbon footprint by going paperless, waste recycling, switching to LED lightbulbs, switching off appliances not in use, etc. Use virtual meetings and workspaces to reduce the need for travel by plane or car.

Checklist for establishing a business case for a digital workplace:

- How may it help to improve the employee engagement?
- How may it improve operational efficiency and productivity?
- How may it reduce operational costs, e.g. travel, phone calls?
- How may it improve customer service and responsiveness?
- How may it help to reduce your carbon footprint?
- How may it reduce the need for physical office space?
- How more attractive would it make your organization to new employees?
- How may it to improve knowledge transfer from current to new employees?.

STEP 1: ESTABLISH A VISION FOR THE FUTURE

Look outside your industry for new and better approaches. Substantive change is often coming from disruptors outside your industry, while incremental change is happening as companies become more efficient. Transformational change happens because someone takes a group of capabilities and fundamentally moves onto your turf but with a wholly different perspective and upends your business model.

Establish a vision for the future that focuses on the benefits of achieving the vision for staff and the business. The vision should provide a picture of the future, but also include values that will guide you in your journey. Here are some examples from Gartner analysts Matthew W. Cain, Mike Gotta and Carol Rozwel:

- **Endeavor to "work in public"** — where projects, research and activities are available to anyone in the community or the organization — to spur awareness, collaboration and, ultimately, innovation, while respecting personal privacy.
- **Continuously expand literacies** — new media, information, technical, for example — to spur personal growth and help the company thrive in the digital economy.
- **Create a sense of belonging and ownership** — through novel thinking and the use of employee-chosen devices, applications and other services to facilitate personal and organizational agility and effectiveness

Your C-suite have to own this vision, but also lead the journey for achieving it. They have to understand that the journey involves risks, and it will take time and resources to change culture and ways of working. Success is 80% about people, 15% about processes, and 5% about technology. Ensure you are working with all stakeholders, otherwise you might design a digital workplace for a future that won't be arriving.

Different generations have different preferences. Create personas that represent your workforce, and ensure your vision provide value to the different personas. Use storytelling to explain what the digital workplace will mean for different personas.

Set out achievable goals over the next 1, 2, 3, 4 and 5 years – it's a process and some foundational aspects have to come first. Start today and be prepared to solicit and accept some uncomfortable truths (from some atypical sources). Remain positive and ensure your plan quickly show benefits.

Case study: Australia Post's approach to developing its integrated experience and workforce platform began by asking and answering three key questions: **1) What do employees require of Australia Post to effectively connect to/with the organization? 2) What must Australia Post enable for employees to feel empowered and motivated to continually evolve and innovate how they do their work? 3) What do employees expect to be able to do for themselves in managing both work and personal administrative obligations?** The answers to these questions resulted in the creation of eight personas to represent Australia Post's diverse workforce. The resulting understanding of worker needs then informed the project's overall strategy and vision (source: The digital workforce experience: Getting technology to work at work, Deloitte 2019).

STEP 2: IDENTIFY USER STORIES

Use the personas to determine how to better connect people, information, and knowledge while making security and compliance inherent and transparent to knowledge workers. Focus on documenting use cases that needs to be supported, not functional requirements. Identify your systems of record for documenting business transactions and obligations (e.g. CRM, ERP, ECM), and then your systems of engagement for better connecting people, information, and knowledge (e.g. search, activity walls, online messaging, video conferencing).

Keep in mind that different generations have different preferences, and people need different tools (e.g. live virtual meetings) or office spaces (e.g. quiet rooms) for different tasks. Your digital workplace design needs to set standards for collaboration for all personas, e.g. use chat instead of email for internal communication, and your office space management and design should accommodate different preferences and tasks, e.g. brainstorming rooms to be creative, quiet rooms for thinking and planning.

Staff needs to be empowered to do their job, but also identify ways to improve it. Many processes include decision gates with approvals and exception reviews that slow down the business. Try to minimize these – or set policies in place – to empower staff do work and make decisions without asking – or waiting – for approvals for 80% of their work.

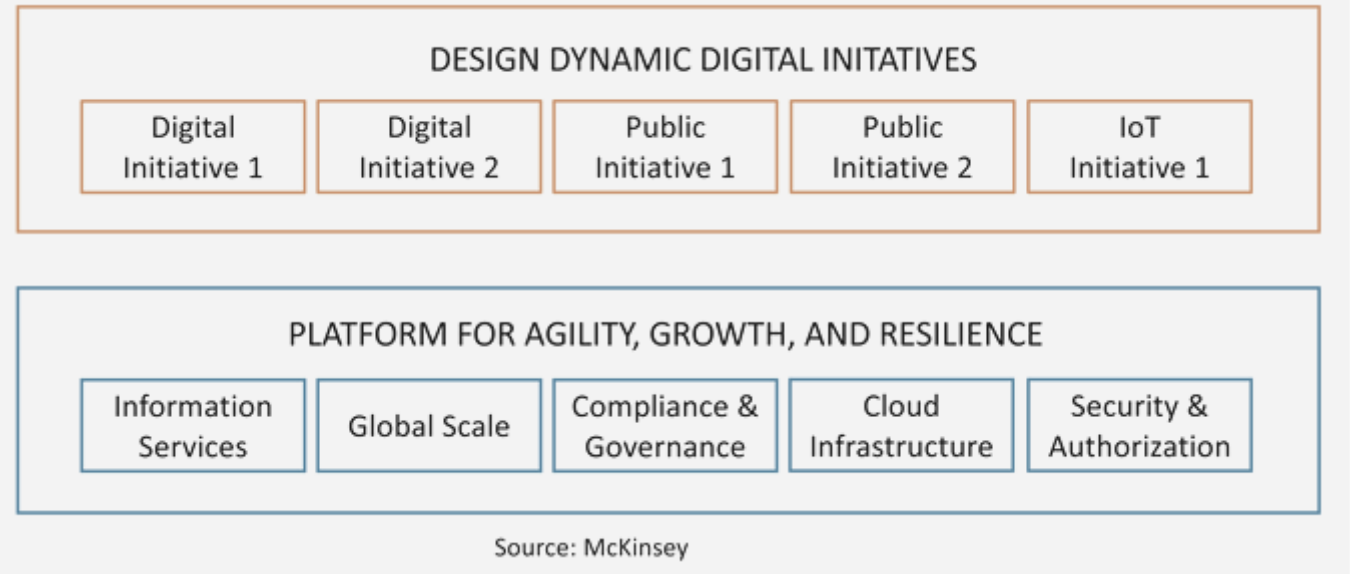
Ensure your security requirements don´t hinder your digital workplace. The business wants openness while security professionals want to lock things down. Many security professionals talk about things like zero trust and challenge response, which is often anti-digital. Staff often only get access to what they need to do their job, which hinders knowledge sharing and innovation. Implement therefore “frictionless security” by asking security professionals to justify on a session by session level everything they want to implement that impacts the user experience. Get your security people to justify everything they require of users.

STEP 3: ESTABLISH THE FOUNDATION

According to best-selling author, speaker, and advisor Geoffrey A. Moore, you have to work your way up…

- **Reframing your infrastructure model** by leveraging cloud, mobile, social, and AI
- **Reframing your operating model** to improve customer intimacy and operational efficiency
- **Reframing your business model** to get net-new business Start by replacing legacy IT systems and silos with an IT platform for the future.

Start by replacing legacy IT systems and silos with an IT platform for the future. This will be your foundation for internal and external digital initiatives.



Source: McKinsey

Ensure that your platform can support “church vs state” separations of datasets when required, e.g. serving customers that compete with each other.

Information is the new "oil" of the digital age that can be used to add value, minimise risks, reduce costs, and identify new opportunities. Open up access to information across your organization to allow people to learn from each other and collaborate effectively. Eliminate local information ownership by defining information as a corporate asset. You will also require master and metadata standards to enable interoperability across the organization. Establish governance roles and frameworks to ensure continous optimization.

STEP 4: EMBRACE MOBILE AND INTERNET-OF-THINGS

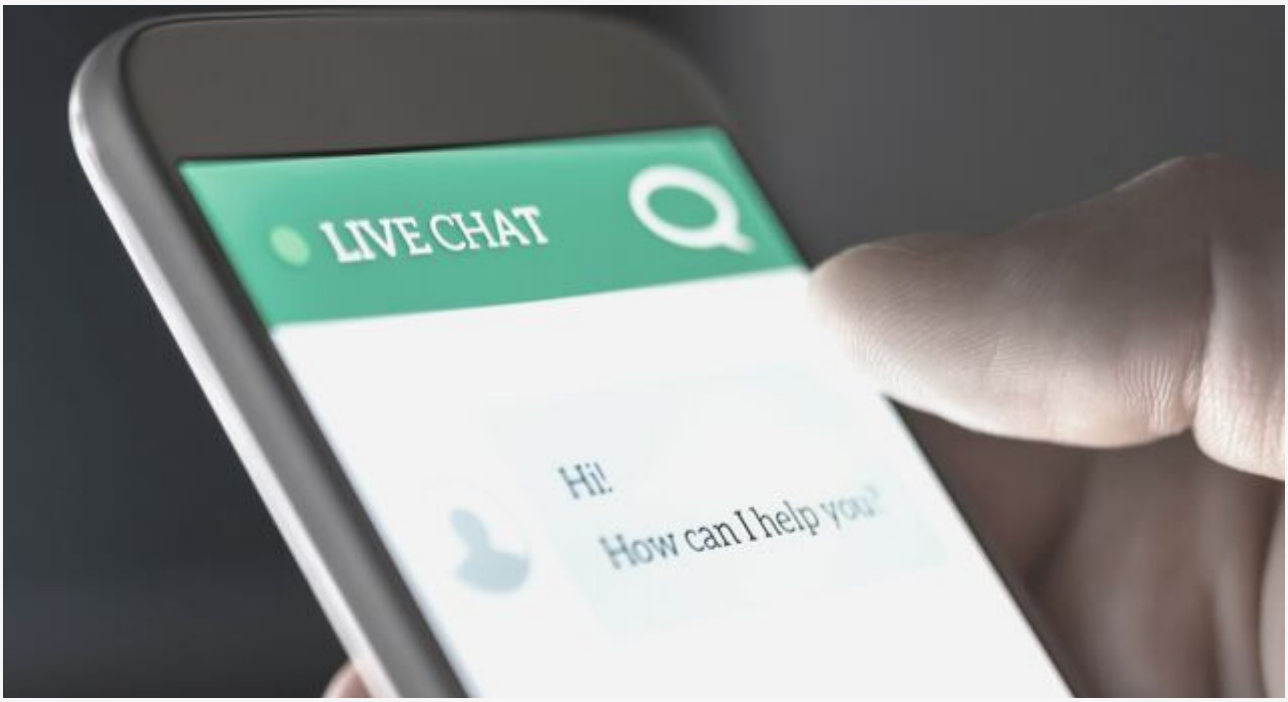
Work is now a state of mind, not a place. Use mobile and Internet-of-Things to better connect the virtual and physical world. Enable staff to work from anywhere. Ensure they find the information they need when they need it, where they need, and how they need it.

Internet-of-things (IoT) opens up new opportunities for connecting and engaging employees. This can be used for wayfinding (e.g. find people and locations), more automation (e.g. managing inventory), recommendations (e.g. what is near you), and better security (e.g. access control).

STEP 5: LEVERAGE MACHINE LEARNING AND ARTITICIAL INTELLIGENCE

Every IT project should now include some elements of machine learning and artificial intelligence. Figuring out the right balance between investment in traditional BI and analytics while also advancing projects with emerging technologies is a challenge but necessary to prepare your organization for the future.

Machine learning and artificial intelligence bots can speed up your business by automating manual processes and tasks, e.g. Capture Bot, Query Bot, Task Bot, and Action Bot. This could be driven by machine learning and artificial intelligence for process automation, auto-analyze, recommendations, anomaly detection, and decision support. Let people do real work instead of paperwork.



The adoption of intelligent software and physical robots has already started to impact many industries. Leverage robots to automate manual steps and processes to increase the speed of your business while reducing costs.

STEP 6: CREATE A PALETTE OF UNLIMITED TOOLS

You do not have the resources to make all the changes. Create instead a palette of tools that are unlimited. Offer training courses, e.g. digital workflows, and empower staff to become change agents, e.g. automate the manual processes they hate the most. This gets people involved with the transformational effort. They think that they are all agents of innovation, which helps you move down that pathway of a digital workforce. Not because you are controlling it, but you're partnering with people and enabling them to do great things.

Case study: University of Alabama in Birmingham have realized that the IT department doesn't have the resources or capacity to fix all the manual processes created over the last 50 years. They created therefore an unlimited set of tools for the business, offer training that hundreds of people attend, and this empowers staff to go back to their business to improve and automate the processes they hate the most.

STEP 7: CHANGE MANAGEMENT

Changing the way of working requires change management. Get executives to lead by example and establish communication and on-demand training courses that empowers staff. Business and technologies constantly change, and the digital workplace will have to change with it.

Try to quickly establish a showcase or lighthouse office to demonstrate the value of the new digital workplace to the rest of the organization. Get the business to want a new digital workplace by demonstrating “what’s in it for me”.

CRITICAL SUCCESS FACTORS

People like progress, but not the change. Below are therefore a summary of critical success factors for establishing a digital workplace.

- A realistic understanding of your business today and how it will still be relevant in 5, 10, 20 years
- A realistic understanding of the micro and macro forces and trends affecting the core of your business, your staff, your customers
- A realistic understanding and capacity to change what needs to change over the next 2 – 5 years (if you haven't done so within 5 years, you may be out of business)
- Alignment of the board, management, and staff
- A vision of what the digital workplace can be
- Open communication and engagement of at all levels (employees, suppliers, customers) – it's everyone's journey, it's not a destination.

NEXT STEPS

TASK

Click here for video library

Check out video interviews with experts like Geoffrey A. Moore, Dion Hinchcliffe, Ted Schadler, and Thornton A. May.

Click here to sign up for the in-person event

Join the Digital Value Studio event in St. Augustine November 13-14, 2019 (not for IT solution and service providers)

Click here to get help developing a digital strategy

Get help developing a digital strategy for your business.

ABOUT THE AUTHORS:

THORNTON A. MAY
FUTURIST, AUTHOR, EDUCATOR

Twitter: @deanitla

Thornton May is a futurist, author and educator. At Dartmouth College, Keio University [Tokyo] and the Center for Japanese Studies at the University of Michigan, Thornton studied Japanese technology policies and practices during the Meiji Restoration [1868 through 1912], post-World War II and 1970s. Living in Tokyo Thornton worked at a series of global Japanese companies assisting managing "emerging technology" investments.

Thornton was hired by noted futurist Alvin Toffler [Future Shock, Third Wave, Power Shift and Revolutionary Wealth] to assist the "technology futures" program for Toffler Associates. Toffler Associates designed and delivered the strategic plans for South Korea [President Kim Dae-Jung] and Singapore [Minister of Finance Lew Kuan Yew]. These plans specified the technology investments necessary to sustain economic dominance in the twenty-first century.

Thornton returned to America to lead technology research at the Nolan Norton Institute. His research team is credited for coining the phrase "Chief Information Officer" in 1981. Thornton pioneered the multi-client research program designed to discover strategic and operating insights associated with emerging technologies.

His work as a futurist and anthropologist position him as part Paul Revere [the one to sound the alarm] and part Arnold Toynbee/Edward Gibbon [the one who explains what has happened/what is happening].

Thornton has taught at four major universities, written columns on technology for multiple leading publications [25 plus years at Computerworld], advises major organizations and government agencies on how to think differently about technology, all the while conducting seminal anthropological field research into technology-use behaviors of the various tribes comprising modern society.

Thornton began his career as an anthropologist studying tribal behavior in the modern Japanese corporation. He received a bachelor's degree from Dartmouth College, a master's degree from Carnegie Mellon University, and did post-graduate work in Japanese Studies at the University of Michigan. At five feet, seven inches, he played professional basketball in Japan.

Thornton brings a scholar's patience for empirical research, a second-to-none gift for storytelling and a stand-up comedian's sense of humor to his audiences. His book, The New Know: Innovation Powered by Analytics examines the intersection of the analytic and executive tribes.

The editors at eWeek honored Thornton, including him on their list of 'Top 100 Most Influential People in IT.' The editors at Fast Company labeled him 'one of the top 50 brains in technology today.' Thornton is a founding member of the Internet of Things World Forum.

ABOUT THE AUTHORS:

ATLE SKJEKKELAND
DIGITAL BUSINESS EXPLORER AND EVANGELIST

Twitter: @skjekkeland

Atle is a digital business explorer and evangelist. His interest in the business impact of cloud, social, mobile, IoT, and artificial intelligence has made him a frequent keynoter and workshop facilitator at events across the world.

Atle has a MSc in Economics and Business Administration from the Norwegian School of Economics with a specialization in business strategy and marketing. He has since 1996 spent his career in IT and Information Management, with a focus on how information can be used to add value, reduce costs, manage risks, and/or create new opportunities. This has made him into a leading information management innovator and educator.

From 2004 to 2018, he worked as VP, COO, and SVP at AIIM – a global association for intelligent information management. While at AIIM, he founded the AIIM annual conference, online community, certification, and training programs with over 30,000 students. He also served several years as the General Secretary of the DLM Forum for the European Commission, responsible for creating standards for electronic records management and digital archiving.

Atle led for almost a decade AIIM´s information management think-tank in EMEA and NA with a focus on identifying the future and impact of cloud, mobile, social, AI, etc. He also participated in several task-forces about the future of Enterprise IT with industry experts like Geoffrey Moore [best-selling author of Crossing the Chasm] and Andrew McAfee [best-selling author of Race Against the Machine]. The task-force with Geoffrey Moore introduced the concept Systems of Record vs Systems of Engagement, and a Forbes blogger named this the best social media idea of 2011. While at AIIM, he also developed and delivered custom information management programs for several large organizations like Chevron, European Central Bank, HP, Konica Minolta, and Oracle.

ABOUT THE TECHNOLOGY PARTNERS:

ABBYY

ABBYY is a global provider of content intelligence solutions and services. We are a global company that sets the standard for content capture with innovative language-based technologies that integrate across the information lifecycle. ABBYY solutions optimize business processes to mitigate risk, accelerate decision-making and drive revenue. For more information about ABBYY, visit www.abbyy.com

ABOUT THE TECHNOLOGY PARTNERS:

AvePoint accelerates your digital transformation success. Over 16,000 companies and 6 million Office 365 users worldwide trust AvePoint software and services for their data migration, management, and protection needs in the cloud, on-premises and hybrid environments. AvePoint is a Microsoft Global ISV Partner and four-time Microsoft Partner of the Year Award winner. Founded in 2001, AvePoint is privately held and headquartered in Jersey City, NJ.

ABOUT THE TECHNOLOGY PARTNERS:

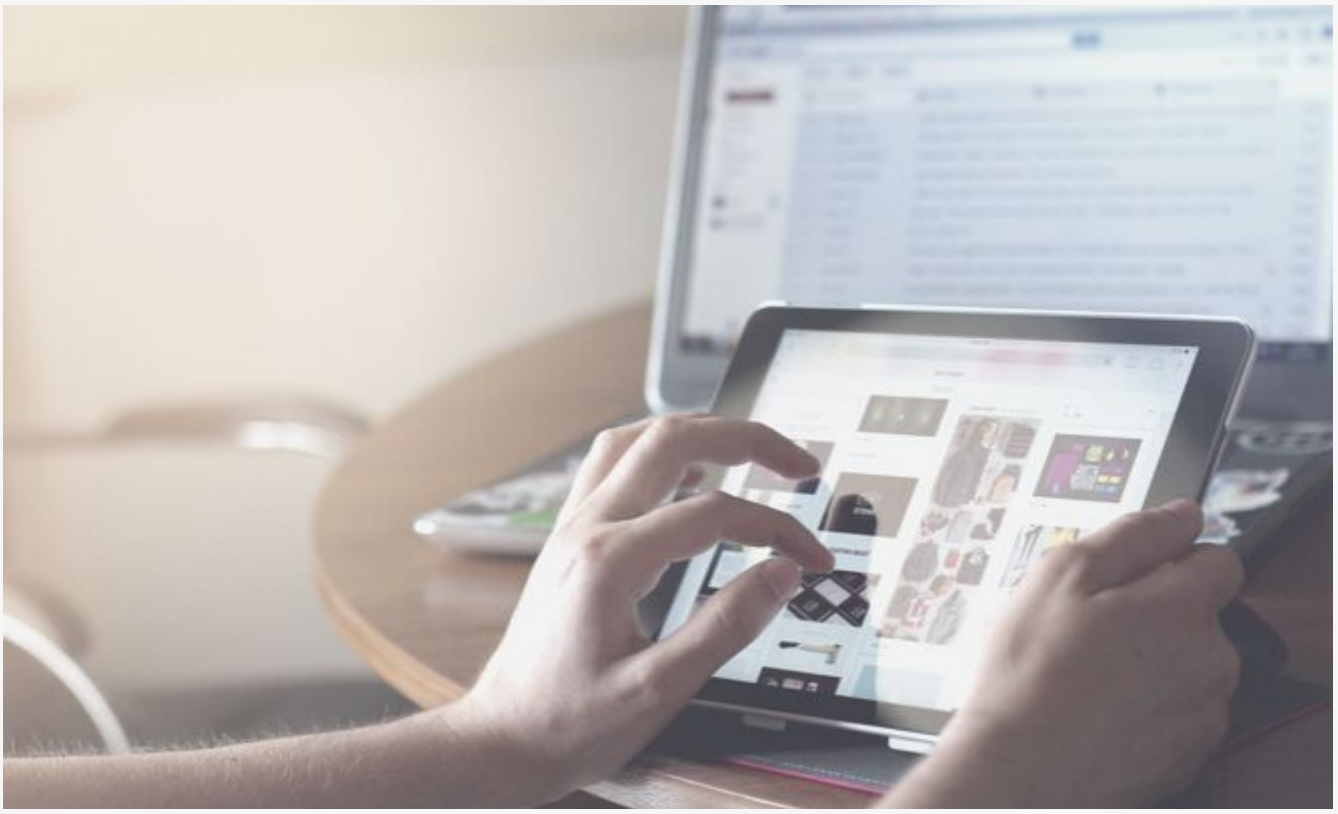
opentext™

OpenText delivers information advantage with world-class Enterprise Information Management (EIM) technologies, transforming how insight is created and decisions are made. OpenText EIM solutions enable enterprises to leverage information assets to their full potential – on and off the cloud – to drive productivity, growth, and lasting competitive advantage. With a focus on world-class EIM technologies and services, OpenText continues to innovate and provide customers with the capabilities they need to become tomorrow's disruptors.

Using integration, automation, and AI, OpenText connects, synthesizes, and delivers information where it's needed to maximize its value. OpenText offers deployment options, consulting, and integrations for on-premises, hybrid, cloud, and managed services solutions to ease the transition to cloud and help customers leverage existing technology investments. With 13,000 leading experts focused on delivering EIM to 130,000 customers across 40 countries, OpenText understands and addresses the complexity of information flow, so you can:

- Build automation and agility into business processes
- Integrate operations and improve supply-chain efficiency
- Create more engaging customer experiences
- Turn mountains of data into new insights
- Improve content management, information discovery and security
- Detect and respond to digital threats or extract forensics from all your endpoints

OpenText helps customers realize an information advantage with an industry-tailored approach to process, governance, culture, and technology to deliver solutions that address industry-specific trends, business challenges, and regulations.
Learn more about OpenText (NASDAQ/TSX: OTEX) at www.opentext.com



SOURCES

Digital Value Institute web interviews

Digital Value Institute calls with CXO Advisory Council members

Geoffrey A. Moore; Escape Velocity

Deloitte's 2019 Global Human Capital Trends survey

Sierra-Cedar, Sierra-Cedar HR systems survey, 2018

Josh Bersin, The employee experience platform market has arrived, May 14, 2019

The digital workforce experience: Getting technology to work at work, Deloitte 2019

Create digital workplace manifesto for executives and employees, Gartner

A business checklist for the future, MIT Sloan