

# THE NEW EMPLOYEE EXPERIENCE

Emerging Technologies Reshaping  
the Future of Work

Prepared by

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## THE NEW EMPLOYEE EXPERIENCE EMERGING TECHNOLOGIES RESHAPING THE FUTURE OF WORK

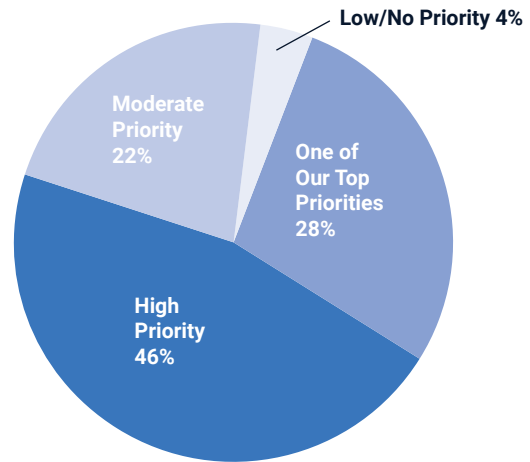
The world of work has changed. Demographic and economic factors, from the rise of a new generation of younger workers to a record low unemployment rate, have shifted the expectations of both employers and employees. According to the U.S. Bureau of Labor Statistics, the number of employees quitting their jobs has hit record levels every year for most of the past decade,<sup>1</sup> with workers increasingly citing issues related to the employee experience (EX), from lack of work-life balance to a desire for more workplace flexibility, as factors in their decision to change jobs. And recent surveys show the cost to employers of high turnover totals between \$200 billion up to \$1 trillion a year.

With so much on the line, employers are increasingly focusing on creating an EX built on values that align with both employee and business needs, from improved productivity to higher engagement levels. And, more often than not, they're turning to technology to help them meet those goals.

Against this backdrop, Dow Jones Intelligence (DJI) set out to investigate how, through the lens of new and emerging technologies, companies can drive higher employee engagement, which in turn will deliver significant employer benefits. DJI, sponsored by Citrix, undertook a comprehensive global survey of 1,000 senior IT and HR executives, measuring 13 different emerging technology solutions, including artificial intelligence, machine learning and robotic process automation (RPA), to generate a deep look at the future of work and the technologies that will enable it.

We found that employers are embracing technology solutions to dramatically transform the employee experience at their companies, helping them attract and retain the most desirable workers, boost productivity and increase revenues. Businesses around the world are devoting significant resources to using technology to advance EX, with 74% of respondents rating it as a high or top priority. In fact, just 4% listed this as low/no priority, indicating nearly universal acknowledgment of the benefits of leveraging

**Figure 1**  
Level of Priority Using Tech for Employee Experience



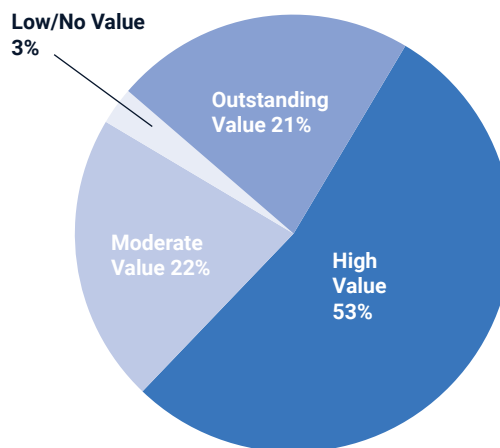
Source: Dow Jones Intelligence and Citrix Proprietary Survey.

technology to enhance the employee experience (figure 1).

Further, these executives anticipate that emerging technology solutions will transform their employee experience, with 81% saying they envision their EX strategy being completely or significantly transformed over the next five years.

Beyond the transformative effect these technologies will have on their employees, 75%

**Figure 2**  
Anticipated Financial Benefit



May not total 100% due to rounding.  
Source: Dow Jones Intelligence and Citrix Proprietary Survey.

1. Job openings, hires, and quits reach historic highs in 2018, Bureau of Labor Statistics, July 2019.

of respondents expect to see high or outstanding financial benefits from these solutions, driving a strong return on investment (figure 2).

Among the factors driving these plans are new security and privacy regulations, the growth in flexible work styles, the ongoing talent and skills shortage, and the changing expectations of a multigenerational workforce (figure 3). These findings are consistent with earlier data highlighting similar issues facing employers. A 2015 survey by the Society for Human Resource Management, for example, shows 80% of HR professionals citing flexible work arrangements as having a positive effect on employee engagement.<sup>2</sup>

What’s new in the DJI research is the nearly universal commitment to technology as a critical element of any EX strategy. Employers of all sizes were equally committed to making new technology solutions a cornerstone of their employee experience plans, and even those that reported that they’re still at the beginning of their digital transformation journey agreed that this is a key priority.

We also found that employers are investing in specific technologies that can address these marketplace trends, such as digital workspaces and remote access solutions, which help enable flexible work styles, and workplace analytics solutions that can be used as part of larger security programs. Additionally, employers are increasingly interested in automation solutions, including artificial intelligence, robotic process automation and intelligent workflows, that can help address the skills shortage while enhancing the employee experience, as workers are freed from more mundane or rote tasks. In short, the

new world of work is being fueled by technology, and the same innovations that are driving business transformation are also helping to advance the employee experience.

“With the right tools, technology will keep employees engaged every single day, whether they’re in a meeting or just got off a challenging customer call,” said one respondent. Another respondent added that their company’s goal was to find “technology that creates happiness based on improving employee life and work balance.”

## TECH TRENDS HELP SHAPE EX STRATEGIES

Pairing desired outcomes in EX with technology first requires an understanding of which technology trends will most impact employee experience, and it should come as no surprise that respondents cited cloud-based apps as the most significant driver of EX strategy. Nearly all of the specific solutions cited by respondents as being most effective, including virtual conferencing, remote access and collaboration tools, are dependent on cloud-based infrastructure. Data from numerous sources demonstrates that virtually all enterprises now use Software as a Service (SaaS) applications in some capacity.

Indeed, it may be safe to say the expansion in EX as a discipline over the last several years would not have been possible without the simultaneous growth of the cloud as a platform for business applications. The latter has fueled the former, freeing workers from their desks and businesses from legacy technology.

**Figure 3**

### Impact of External Demographic Trends in Deploying Technology for Employee Experience

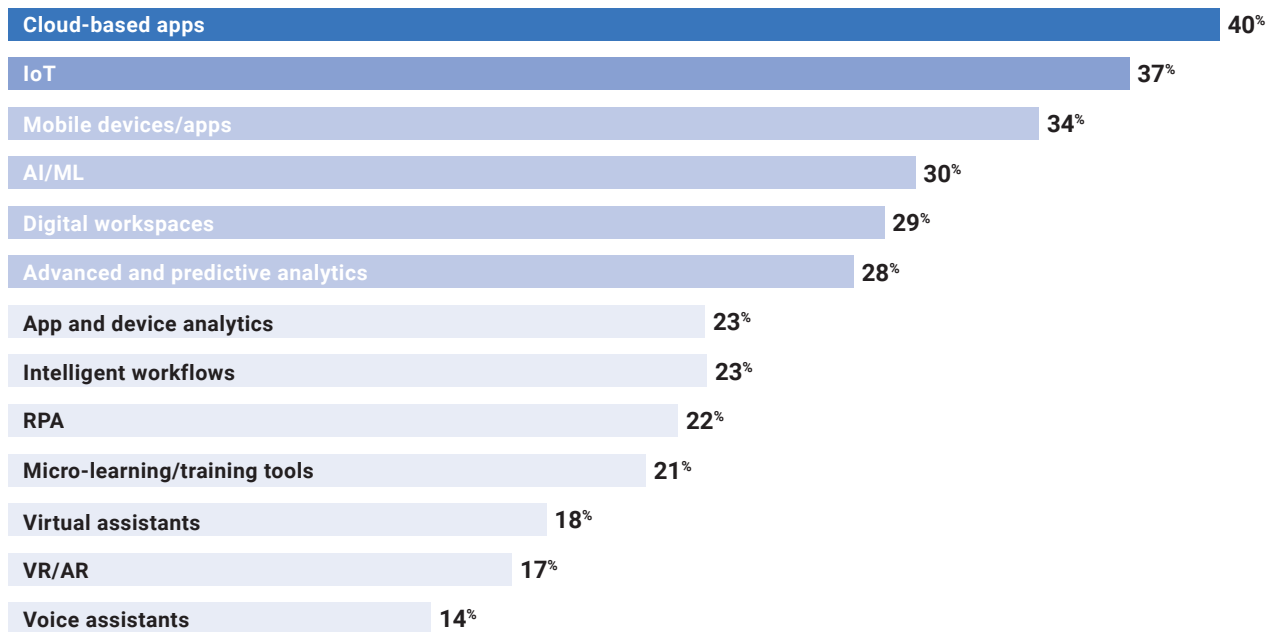


Source: Dow Jones Intelligence and Citrix Proprietary Survey.

2. SHRM Research: Flexible Work Arrangements, Society for Human Resource Management, 2015.

**Figure 4**

**Impact of Tech Trends in Deploying Technology for Employee Experience**



Source: Dow Jones Intelligence and Citrix Proprietary Survey.

## Collaboration and Creativity

“Knowledge workers need a collaboration platform based on employees accessing information and communicating very quickly,” says Sanjay Srivastava, chief digital officer at Genpact, a digital transformation consulting firm. “They want to have a thread of conversations so, when a new team member joins, they know the full history of why they came to a certain decision. And most companies actually lose all of that information because they don’t have the right digital capability or technology workspace. Things are sitting in documents and emails, and on my computer or your computer, and they get lost.”

For Srivastava, the right digital solution doesn’t just preserve and encourage those conversations; it frees workers to do meaningful work when and where they can be most effective. “I have engineers that wake up at 3 a.m. and want to take advantage of that eureka moment and write a piece of code,” he says. “I can’t then come back and say our security doesn’t allow that. We have to find ways to accommodate that creativity at the point when it’s coming through. And I think that the right infrastructure for that is critical.”

In that context, other tech trends cited by respondents as being impactful, including the rise of digital workspaces, IoT, and mobile devices and apps, reflect a consistent approach favoring mobility, flexibility and platform independence (figure 4). And artificial intelligence and machine learning – among the most impactful technologies – combined with advanced and predictive analytics, allow businesses to design superior EX strategies, which align people and business goals, leading to more positive outcomes for both.

*“We’re investing in technologies that can bring people closer together and make them feel more cared for, increasing engagement, productivity and innovation.”*

## THE SECURE EXPERIENCE

Security is one of the top factors influencing technology-driven EX goals, and 80% of

respondents listed it as a critical or important consideration for how they deploy technology to improve employee experience (figure 5). Respondents also cited security and privacy regulations as the top external trends influencing how they use technology to advance EX. These trends highlight the increasing need for businesses to balance seemingly contradictory goals: Respondents want to enable greater worker flexibility, make better use of tools like workplace analytics and accommodate a growing alternative workforce, while also meeting security challenges and regulations.

In some ways, the need to meet regulatory frameworks may hold some answers. As businesses increasingly seek to define policies that respect worker privacy and treat data in a way that's consistent with frameworks such as Europe's GDPR and California's CCPA, they will need to ensure that their IT, HR and legal teams, and technology vendors are all aligned and focused on both compliance and EX goals. Numerous companies have found that adopting approaches such as Privacy by Design, which was a basis for GDPR, can help address compliance,

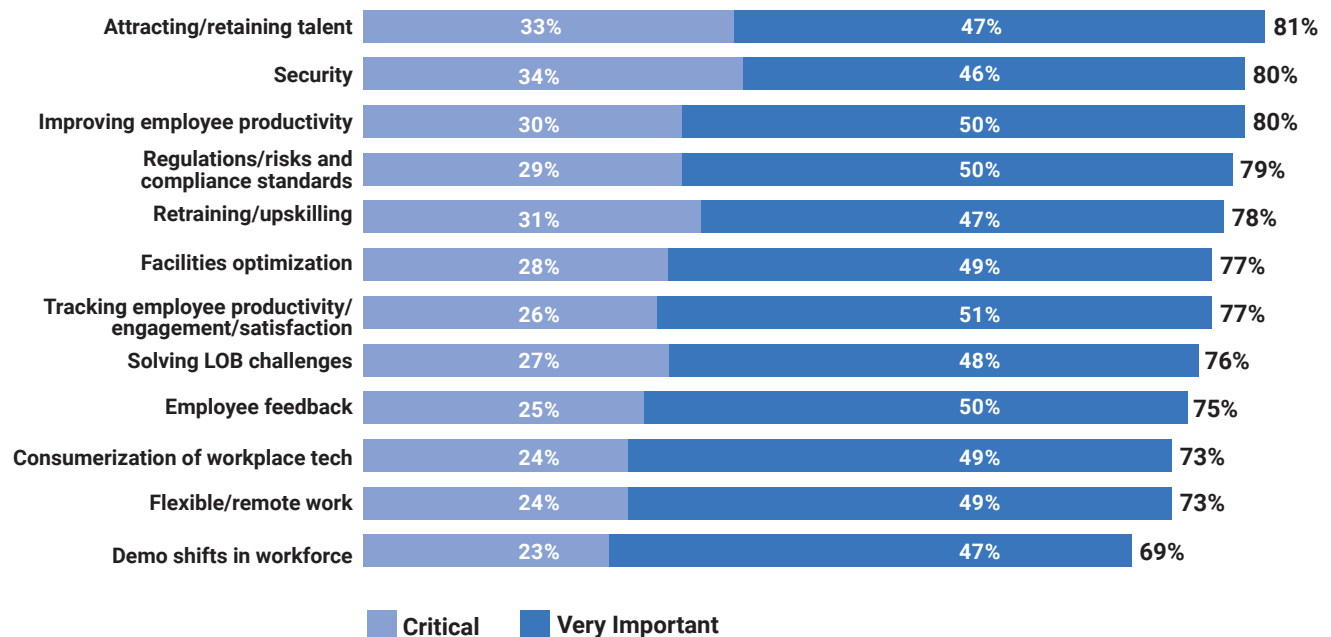
security and employee experience goals, as they can limit the amount of employee data being openly shared over corporate networks.

The focus on security doesn't necessarily conflict with other trends influencing EX strategy. Multiple respondents commented that improvements in security and privacy align with their other priorities, as some of the same infrastructure and policy shifts required to address those issues can help drive a more effective employee experience. As one respondent put it, "Outdated technology puts

*Technological tools are only useful if they actually get used. If they inhibit an employee's ability to work, not only will the tools not be used, but they'll also negatively impact EX, making them entirely counterproductive.*

**Figure 5**

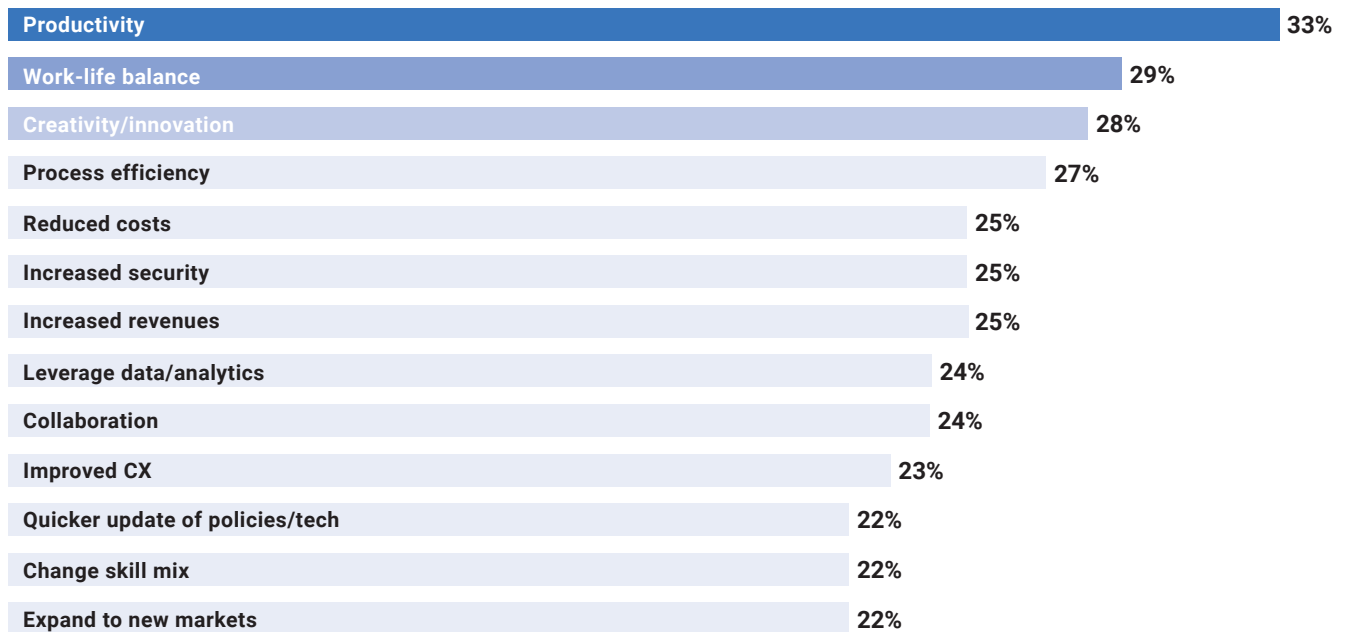
**Important Considerations in How Tech Is Used for Employee Experience**



Percentages may not add as expected due to rounding.  
Source: Dow Jones Intelligence and Citrix Proprietary Survey.

**Figure 6**

Anticipated Employee Experience Benefits, on Average Across Measured Tech



Source: Dow Jones Intelligence and Citrix Proprietary Survey.

## Driving Efficiency and Collaboration One Step at a Time

Simplifying interactions with technology need not be revolutionary to be important. Small efficiencies tied to seemingly mundane, daily tasks can have significant impact on employee experience. At technology giant Lenovo, for example, Carol Minyi Chen, a vice president in the company's IT organization, says that "We eliminated the need for conference call-in numbers and codes and use facial recognition to get people to connect. It pleases people and links them seamlessly as a team." This seemingly small convenience has significant impact, connecting the hundreds of thousands of Lenovo employees working in locations across the globe. "We're eliminating maybe a two-minute nuisance across the network — and with that many people involved, it adds up."

Meanwhile, the company has addressed usability and efficiency for small teams collaborating with a software solution that provides improved co-editing capabilities inside documents. "It reduces the time needed for task splitting and version reconciliation or consolidation. It saves a lot of effort with several people collaborating on one document," she says.

your company's confidential information at risk and sets you up for an expensive data breach, so advanced data storage like cloud is needed to streamline information storage and sharing. That's vital not only for efficiency, but also for security."

## PRODUCTIVITY AND THE DRIVE FOR IMPROVED EX

Having identified the means (critical technology trends driving EX transformation), the survey also revealed the desired ends, as defined by the anticipated benefits of a tech-driven focus on employee experience (figure 6). Respondents ranked productivity gains above all others, followed by an improvement in work-life balance and stronger creativity and innovation.

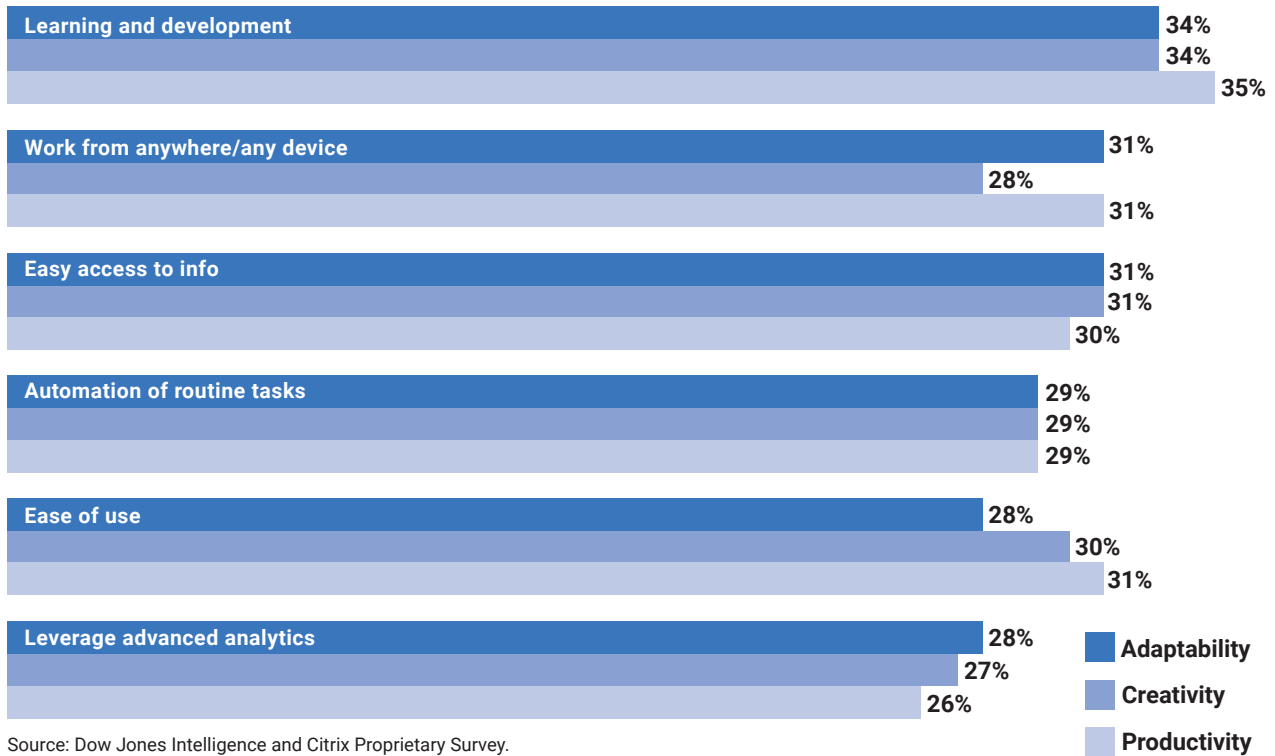
Slowing growth in worker productivity has been a challenge for businesses for at least a decade. According to recent data from the Conference Board, global growth in productivity averaged just 1.9% in 2018, down from 2.9% in the early 2000s. For mature economies such as the U.S., the EU and Japan, productivity growth rates are even lower, at just 0.9% for the U.S. and a *decline* of 1.4% in Japan.<sup>3</sup> In this environment, it's no wonder

3. *Global Productivity Growth Remains Weak, Extending Slowing Trend*, The Conference Board, April 2019.





**Figure 7**  
**Impacts to Organization**



that 79% of respondents cited improvements in productivity as very important or critical priorities for a technology-driven employee experience. The question is, can the EX solutions sought by employers also improve productivity?

Asked which characteristics of workplace technologies are most likely to prove effective, only one response – learning and development (L&D) – was more common than ease of use and the ability to work from anywhere on any device (figure 7).

In fact, 78% of respondents called retraining and upskilling through technology very important or critical. They also expressed a strong belief that, relative to other options, technological investments in L&D carry significant benefits, whether targeted towards productivity, creativity and innovation or the promotion of a healthier work-life balance. Enterprises that self-identified as leaders in digital transformation were even more likely to find value in L&D than less digitally mature counterparts.

The logic is clear: Technological tools are only useful if they actually get used. If they inhibit an employee’s ability to work, not only will the tools not be used, but they’ll also negatively impact EX, making them entirely counterproductive. A focus on L&D is a prerequisite for successful implementation of solutions such as digital workplaces and intelligent workflows, not to mention AI and analytics tools.

As for the No. 2 response – the ability to work anywhere and on any device – previous research shows that the expectations of survey participants may be justified. A two-year Stanford study, for example, found that allowing employees to work from home led to a 13% increase in productivity – and also found that the flexible work arrangement resulted in workers taking less sick leave and reporting higher levels of satisfaction.<sup>4</sup> In short, workers had a better EX *and* higher productivity.

Those findings become even more striking when considering that, after productivity improvements,

<sup>4</sup> Bloom, Nicholas A., James Liang, John Roberts, Zhichun Jenny Ying, “Does Working from Home Work? Evidence from a Chinese Experiment,” *The Quarterly Journal of Economics*, February 2015.



the benefits most cited by respondents to our survey were greater work-life balance and more creativity and innovation. Not surprisingly, respondents cited cloud-based apps and robotic process automation as the technologies with the most potential to improve work-life balance and VR/AR as those that could most effectively drive creativity and innovation. Survey respondents consistently cited RPA, along with AI/ML, as solutions to drive not just productivity but also to free employees from mundane tasks, allowing them to drive creativity and innovation. As one respondent told us, a key priority was to “make routine acts automated to save time and for AI at work to help you bid adieu to monotonous, time-consuming tasks and free up your calendar to focus on strategic initiatives.”

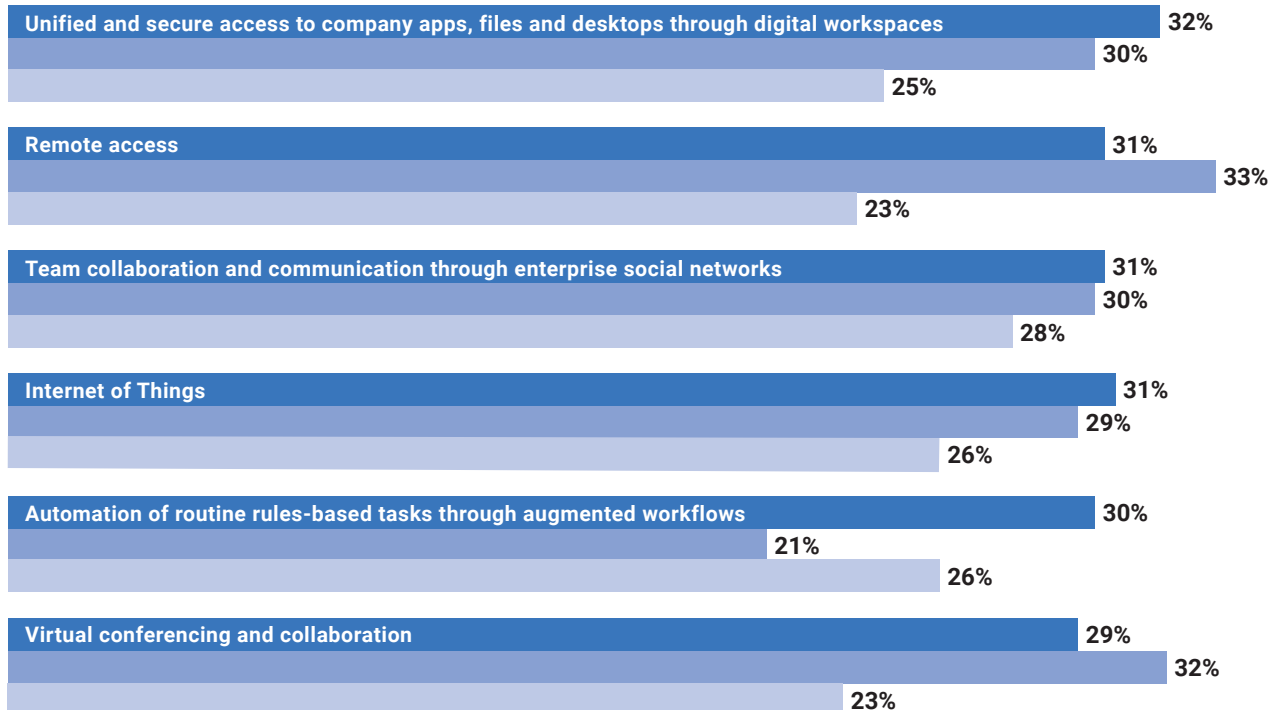
## THE POWER OF COLLABORATION

The specific technologies highlighted by respondents as leading to productivity

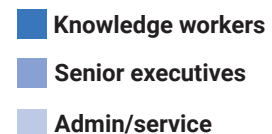
improvements showcase what may be the single most critical capability that workers have gained in the drive to improve the employee experience: frictionless flexibility. Whether it’s categorized as the need to work anywhere on any device, as easy access to information or as a reliance on digital workspaces and remote access, the ability to work efficiently from anywhere is now one of the most vital aspects of an optimal employee experience.

When asked which option of more than a dozen capabilities allowed knowledge workers to perform their tasks more effectively, executives cited digital workspaces as the top solution, followed closely by remote access and collaboration via enterprise social networks (figure 8). For executives themselves, remote access is also a top-ranked technology, while deskless workers are cited as a key solution for administrative and service workers. The common goal of these technological solutions is the reduction of friction employees endure in the name of getting work done. Less

**Figure 8**  
Implemented Technologies With Greatest Impact, by Job Role



Source: Dow Jones Intelligence and Citrix Proprietary Survey.



time spent on nuisance and inconvenience means more time available for innovation, creativity and work that values human talents over mundane, readily automated tasks.

The findings also highlight the importance of technology-enabled collaboration, which becomes even more critical as more employees work remotely or embrace other flexible work arrangements. Across all categories of workers, collaborative capabilities ranked highly, including tools to allow collaboration via enterprise social networks and via virtual conferencing platforms. While this focus on collaboration may at first seem at odds with other responses, where collaboration ranked as a lower priority when ranked against goals such as productivity and efficiency, it's clear that, when viewed as a means to an end, as part of a continuum that leads to improvements in productivity, efficiency and the overall employee experience, collaboration through technology becomes a key solution. As one respondent put it, "Collaboration is one of the many buzzwords floating around the business world, but it's much more than that. It's one of the most critical aspects of a successful company."

## THE OBSTACLES TO EFFECTIVE EX IMPLEMENTATION STRATEGIES

Of course, an hour's experience in business is enough to learn that wanting change and achieving it are two very different propositions. So while awareness of and investments in EX strategies are rising, roadblocks remain.

Not surprisingly, financial constraints were the most frequently cited obstacle to improving EX through technology (35%), with a lack of digital literacy a close second (32%) (figure 9). These results are consistent with another recent study we conducted, in which we asked CEOs and CIOs about the barriers preventing them from achieving their digital transformation goals. Both groups said that IT budgets weren't growing fast enough and that half of their budgets were tied to maintaining legacy infrastructure. Lack of applicable skills was listed by CEOs as the top transformation roadblock.<sup>5</sup>

In short, the obstacles to using technology to transform the employee experience are not dissimilar to the barriers businesses are facing

**Figure 9**

### Biggest Obstacles to Leveraging Tech for Employee Experience



Source: Dow Jones Intelligence and Citrix Proprietary Survey.

5. "Disconn://tech in the C-Suite," The Wall Street Journal | Barron's Group Intelligence, April 2019.





across the entire transformation landscape. It's a conflict created as the vision of transformation bumps up against implementation, where implementers have to contend with technology deficits, unwieldy legacy environments, cost questions and competing priorities across different divisions of the enterprise.

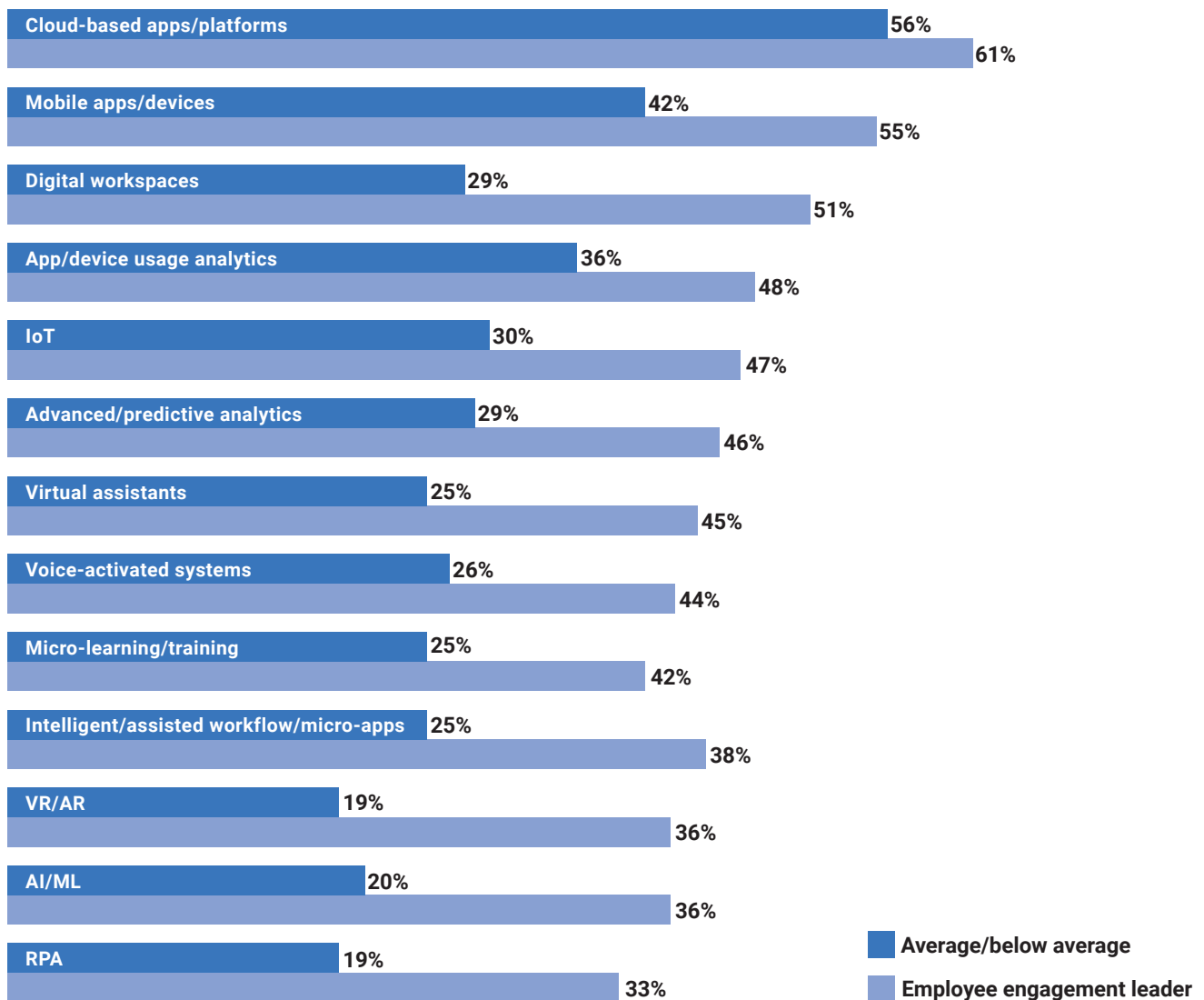
The survey also indicates where technology can be a significant tool in overcoming these obstacles. The emphasis on L&D, for example, can help address the question of digital literacy. Results also revealed that priorities for EX transformation are consistent across HR and IT executives, indicating the potential for better, more coordinated implementation strategies. It's not enough to select and deploy quality IT: The infrastructure surrounding it is crucial. In a future

driven by systems of engagement and intelligence, enterprises must develop and maintain solid processes and efficient workflows. Tools alone can't sufficiently impact EX.

### WHAT'S NEXT?

While there was broad agreement among respondents around the need to use technology to drive improvements in EX, current implementation of the referenced technologies differed – in some cases widely – between respondents who self-identified as employee engagement leaders and those who classified themselves as average/below average (figure 10). In widely adopted technologies, such as cloud-based apps, the difference was relatively small – just 5% between the leaders and laggards. In other areas, the

**Figure 10**  
Implemented, Employee Engagement Leaders vs. Laggards







gap was more striking. Digital workspaces, for example, have been implemented by 51% of the leaders, but just 29% of the laggards. And 48% of leaders are using device analytics, compared with 36% of laggards.

Leaders were less likely to say financial constraints were a barrier when implementing new technologies, which no doubt plays a role in their higher adoption rate of some referenced solutions. However, the broader rationale is simply that organizations that are below average when it comes to employee engagement are less likely to see EX as a priority and are therefore also less likely to prioritize solutions that don't meet other immediate tech needs. As one respondent told us,

"We utilize cloud technology to expand employee thinking while saving company costs. We need to use limited funds for what we really need." However, it's worth noting that, when it involves plans to implement key technologies over the next five years, the gap between leaders and laggards shrinks dramatically. Using technology to improve the employee experience is a priority for the vast majority of businesses going forward, even if some have yet to make the commitment today.

Indeed, prioritizing the employee experience has undoubtedly made its way into mainstream business consciousness, and the pace of implementation for technological tools integral to promoting employee experience

## Keeping Employees ... and Keeping Them Engaged

Schneider Electric is a global specialist in energy management and automation, with more than 150,000 employees worldwide and 2018 revenue of over \$28 billion. The company has a targeted objective guiding programs aimed around digital transformation. "Technology is a huge opportunity for us all to connect with employees everywhere in the world and offer flexibility for the workforce to work differently," says Olivier Blum, chief HR officer. The goal, he says, is a higher level of efficiency allowing employees to "focus on things that really create value."

The push for talent retention led the company to open up an internal job market, connecting employees to potential opportunities inside the company. "It's easy to find a job outside, and they want to have more opportunity inside," Blum says.

The company also found creative ways to allow employees to learn new skills and explore new ways of working. "When you do a deep dive with our employees, many of them don't want necessarily to change their jobs, but they do want to have new learning opportunities," Blum says. "In a pilot project we're conducting in the U.K., U.S. and Singapore, our employees can utilize up to 15% of their time every week to be assigned to special projects. And I can tell you, we have been overwhelmed by the success."







is accelerating (figure 11). That only 4% of respondents are unlikely to leverage cloud-based platforms or mobile apps and devices within the next five years isn't surprising, given the rapid adoption of those technologies over the last few years and how effective they've been at addressing key EX needs, such as device independence and remote access. But even technologies less commonly utilized today, such as voice-activated systems, virtual assistants, and virtual and augmented reality, could see implementation rates exceeding 80%-90%. While there's no guarantee these technologies will have the same impact on employee experience as the cloud, mobility and digital workspaces, it's clear that the majority of businesses are willing to embrace the idea of experimenting with emerging technologies as a way to drive advances in EX.

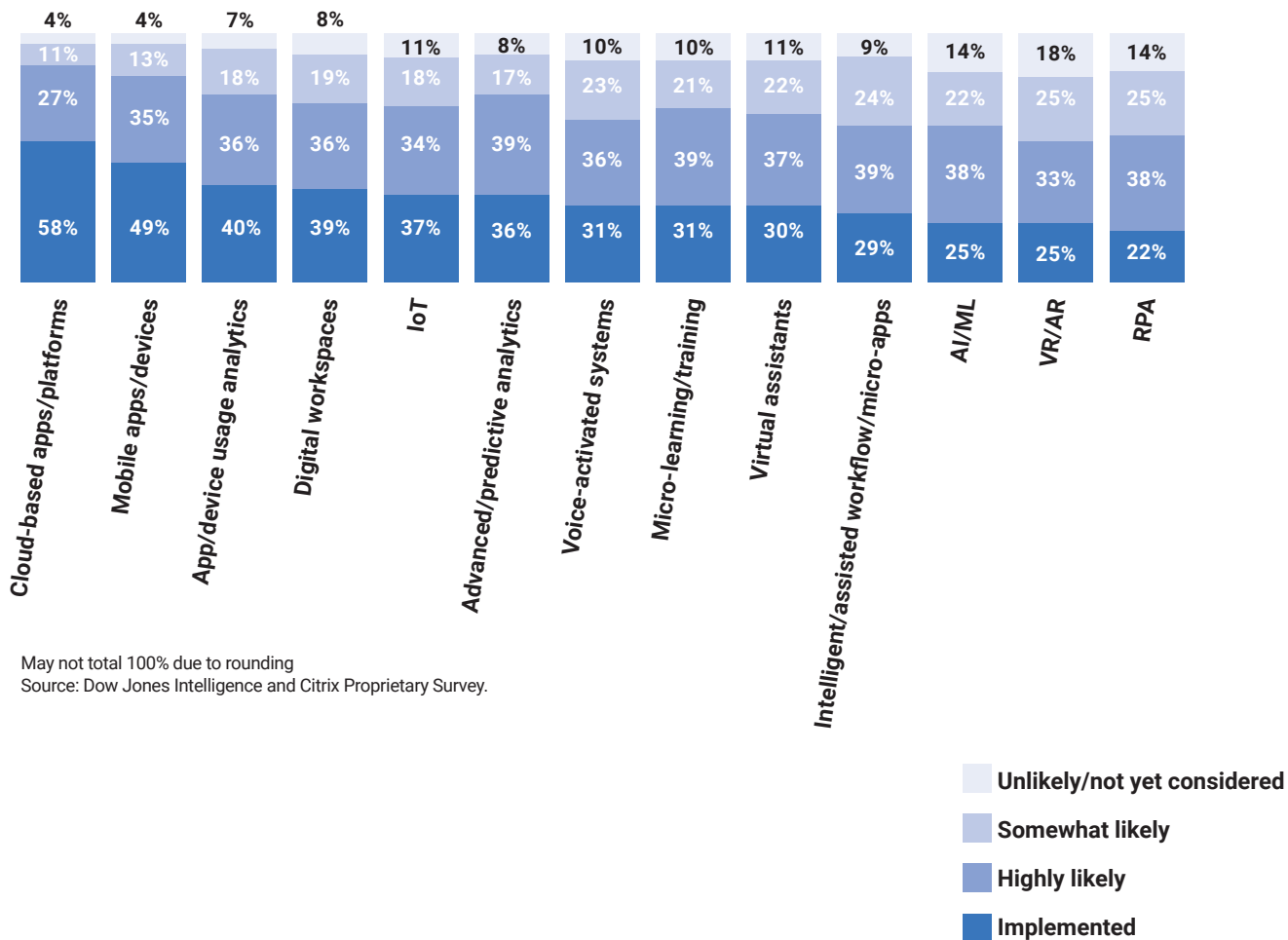
Those numbers drive home the rising awareness of EX as a core component of modern business

strategy, and business leaders understand the genie isn't going back in the bottle.

Companies will always tailor transformation to individual needs, based on industry, business drivers, size, culture and myriad other factors. But when it's built on the common foundation of understanding IT tools, behavioral norms, processes and physical environment, the emphasis on EX is a vision of empowerment for the employee and enterprise alike.

It's a world fully invested in the value proposition individuals bring to the whole and where the future of work is headed. As one survey participant put it: "We're investing in technologies that can bring people closer together and make them feel more cared for, increasing engagement, productivity and innovation."

**Figure 11**  
Implementation Roadmap Next 5 Years



## **ABOUT THIS STUDY**

*The New Employee Experience* is a Dow Jones Intelligence report, sponsored by Citrix. This report is based on a quantitative study of 1,000 business executives (50% IT executives/50% HR executives) conducted in June and July 2019. Half of the respondents held the title of CHRO or CIO; the remainder were either direct reports of the CHRO, CIO or were an SVP/VP or department head.

Regions covered include: U.S., Brazil, U.K., Germany, Australia, New Zealand, Japan and China from a range of sectors (Banking, Finance, Education, Energy, Healthcare, IT, Manufacturing and Retail).

Approximately two-thirds (72%) of respondents work at organizations with under 5,000 employees, with 20% at organizations with 5,000-19,999 employees and 8% at enterprises with more than 20,000 employees.

Among the respondents, 50% are currently employed at self-reported fully digitally mature organizations and 50% at organizations that are not yet digitally mature.

### **Dow Jones Intelligence would like to thank the following people for agreeing to be interviewed for this study:**

Carol Minyi Chen, Vice President, Lenovo

Sanjay Srivastava, Chief Digital Officer, Genpact

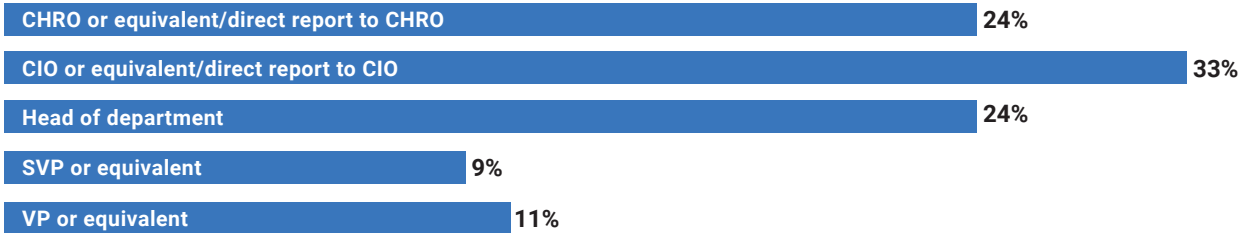
Olivier Blum, Chief HR Officer, Schneider Electric

Fouad ElNaggar, Vice President, Product (Future of Work), Citrix





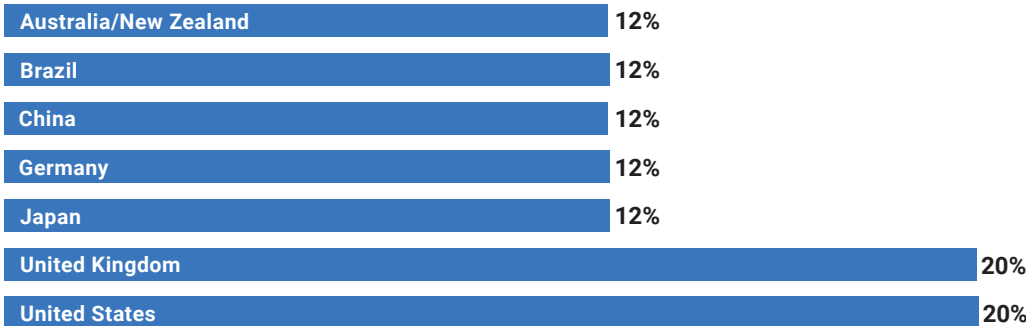
**Which of the following best describes your job title?**



**Which of the following best describes your function?**



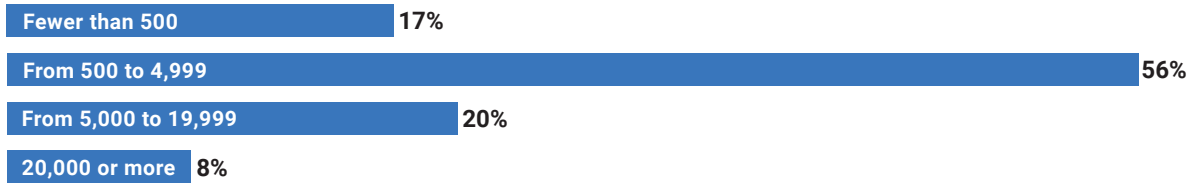
**In which country are you personally located?**



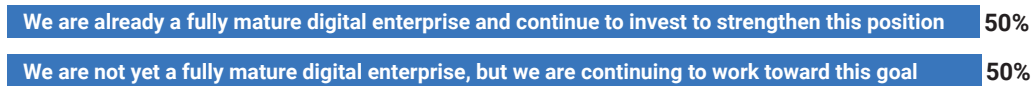
**What is your organization's primary industry?**



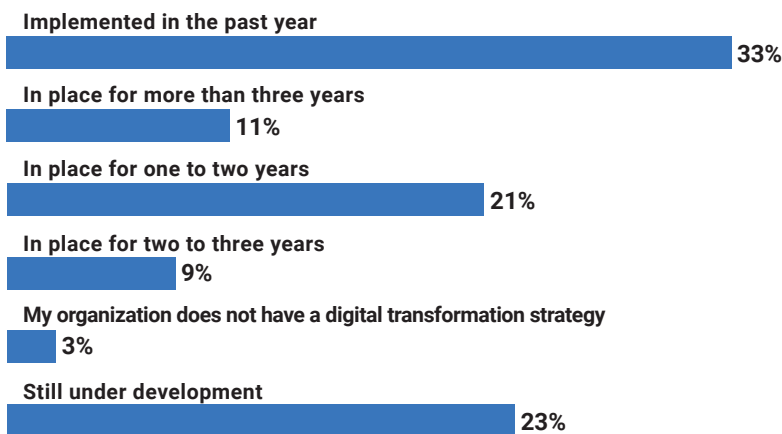
**How many full-time workers are employed by your company?**



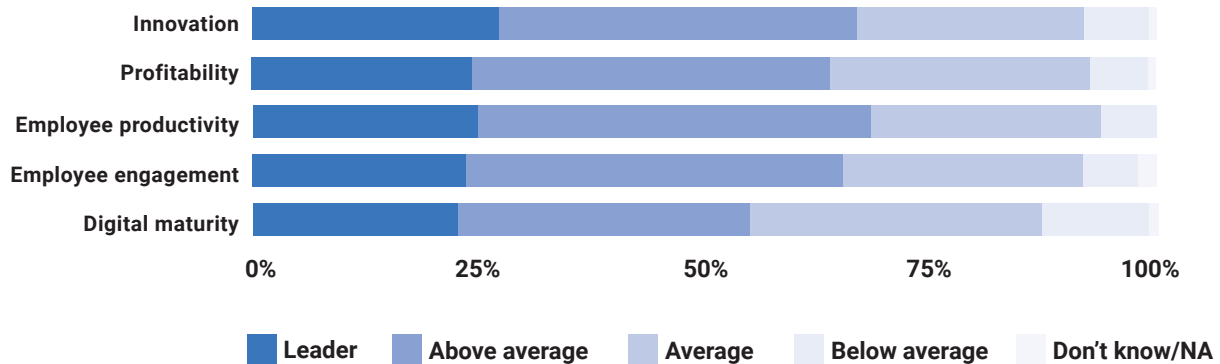
**Which of the following best describes your organization's current state of digital transformation?**



**At what stage of development or implementation is your organization's digital transformation strategy?**



**Please rate your organization's performance in each of the following areas relative to its peers.**

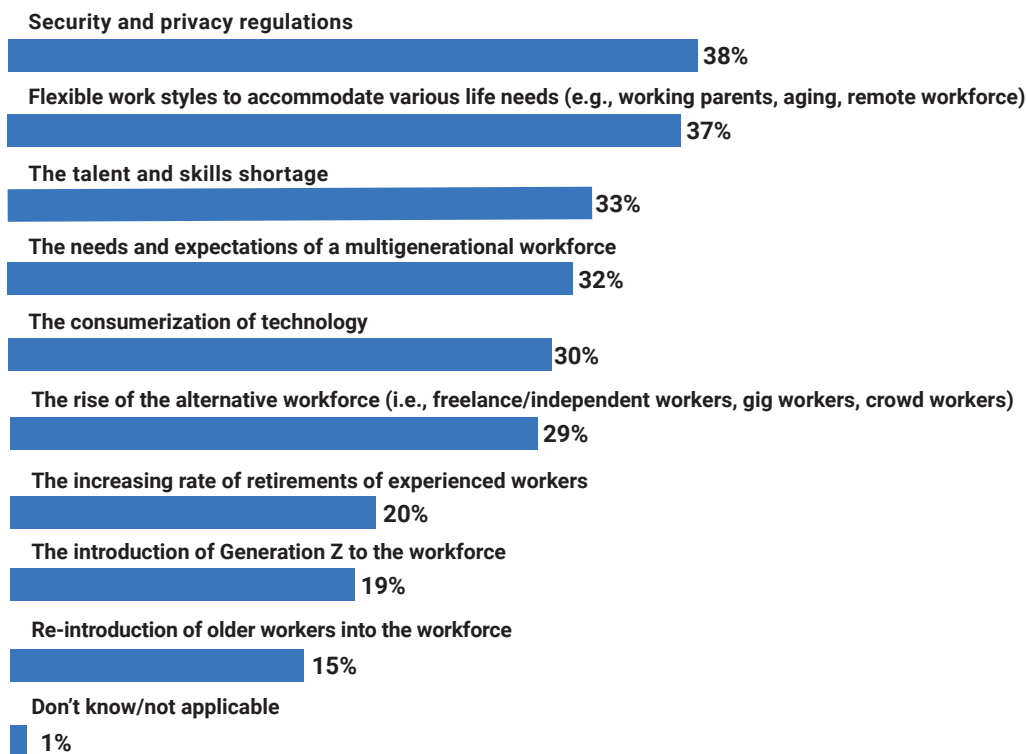




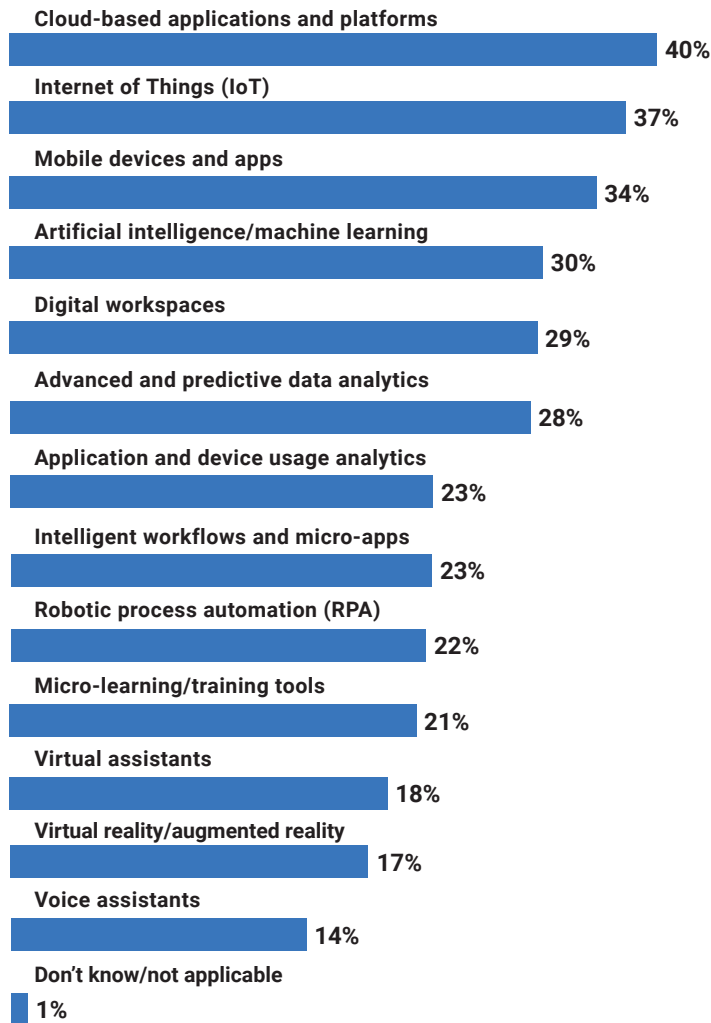
Please rate the importance of each of the following considerations in how technology is used to advance your employee experience strategy.



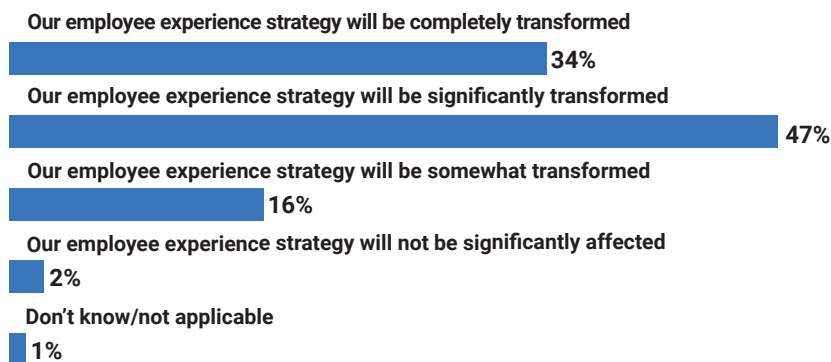
Which of the following external/demographic trends have made the greatest impact on how technology is used to advance your employee experience strategy? Please select up to three.



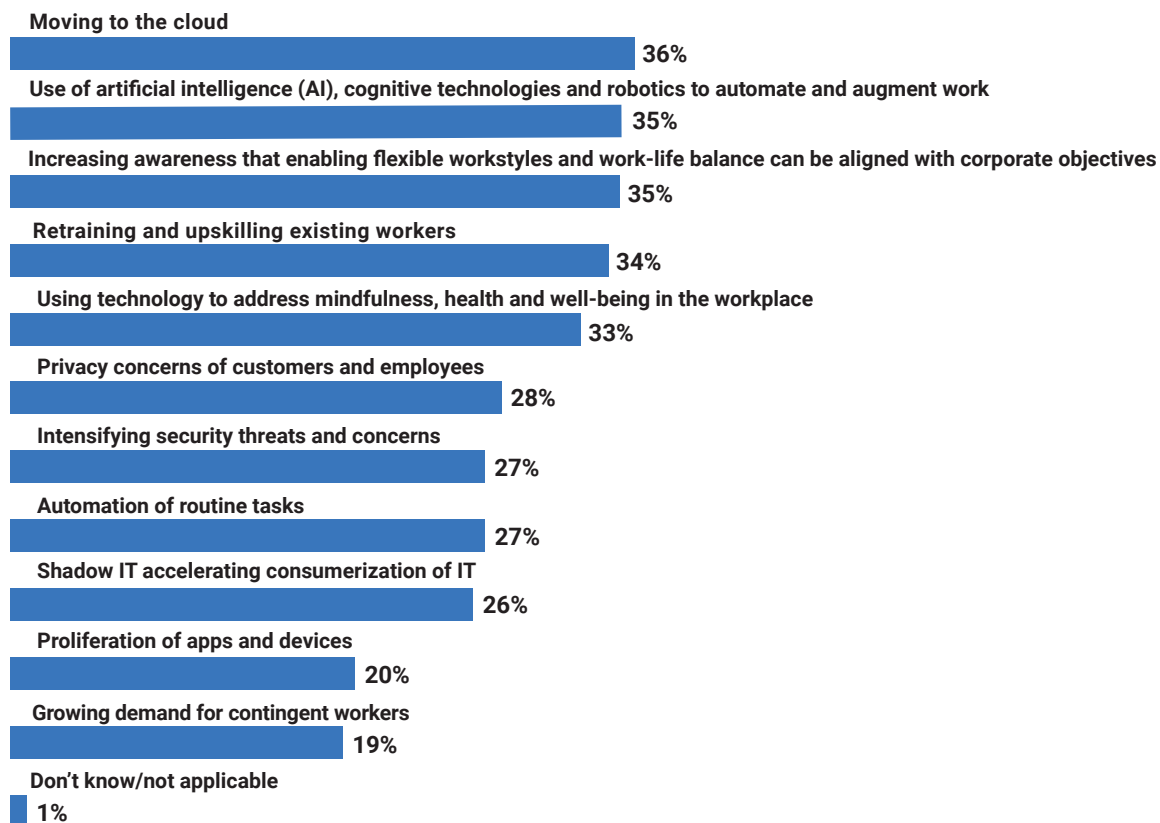
Which of the following technology trends have made the greatest impact on how technology is used to advance your employee experience strategy? Please select up to four.



Thinking of the factors you selected as being most impactful in the previous questions, which of the following best describes the cumulative effect they are likely to have on your organization's employee experience strategy in the next five years? Please select one.



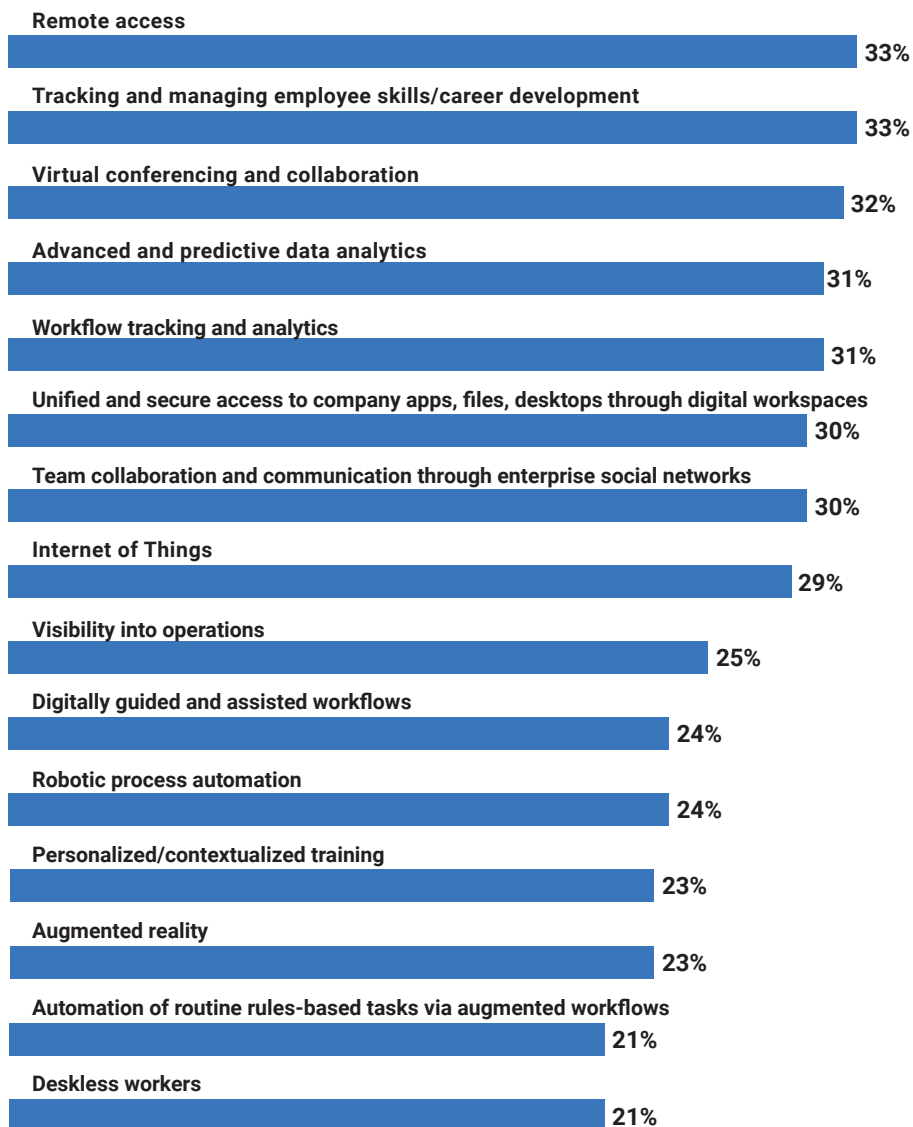
Which of the following business trends have made the greatest impact on how technology is used to advance your employee experience strategy? Please select up to four.





Based on what your organization has already implemented, which of the following capabilities have made the greatest impact on how your organization's employees perform their duties?

### SENIOR EXECUTIVES



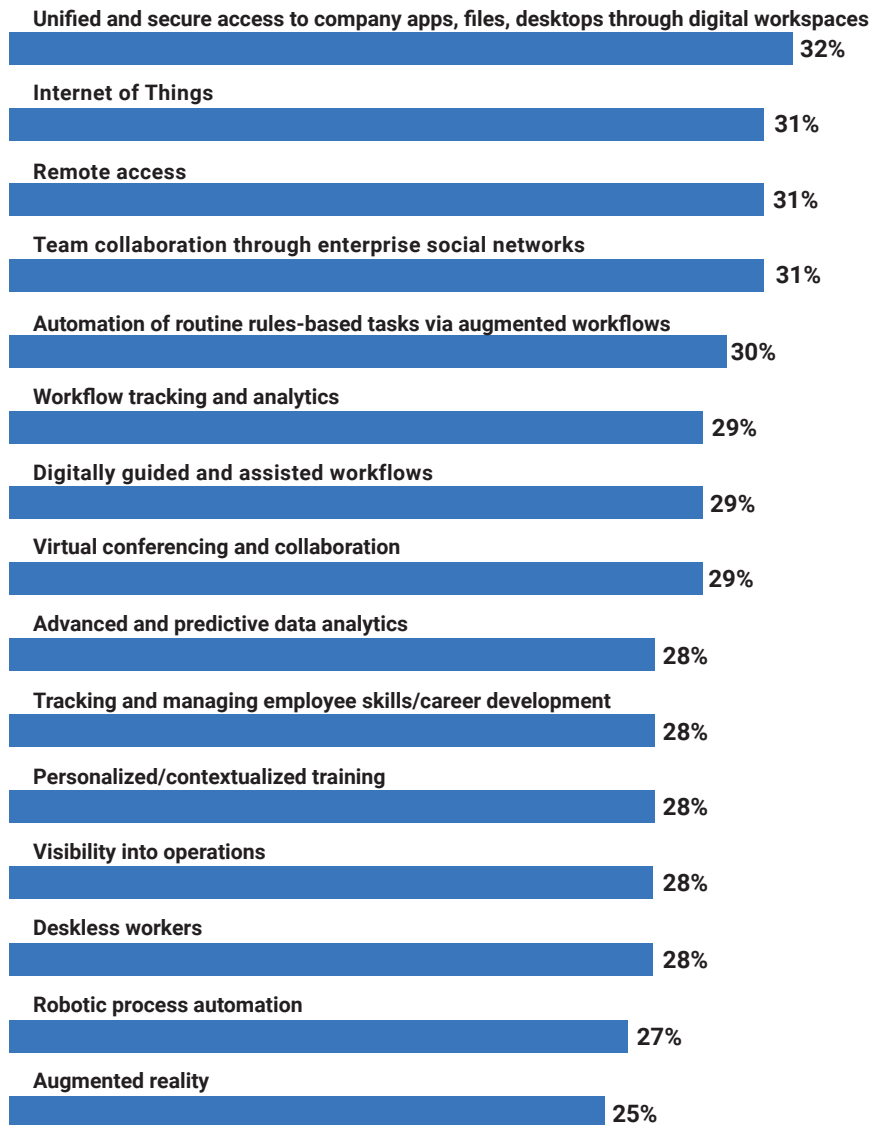
Based on what your organization has already implemented, which of the following capabilities have made the greatest impact on how your organization's employees perform their duties?

#### ADMINISTRATIVE AND SERVICE WORKERS



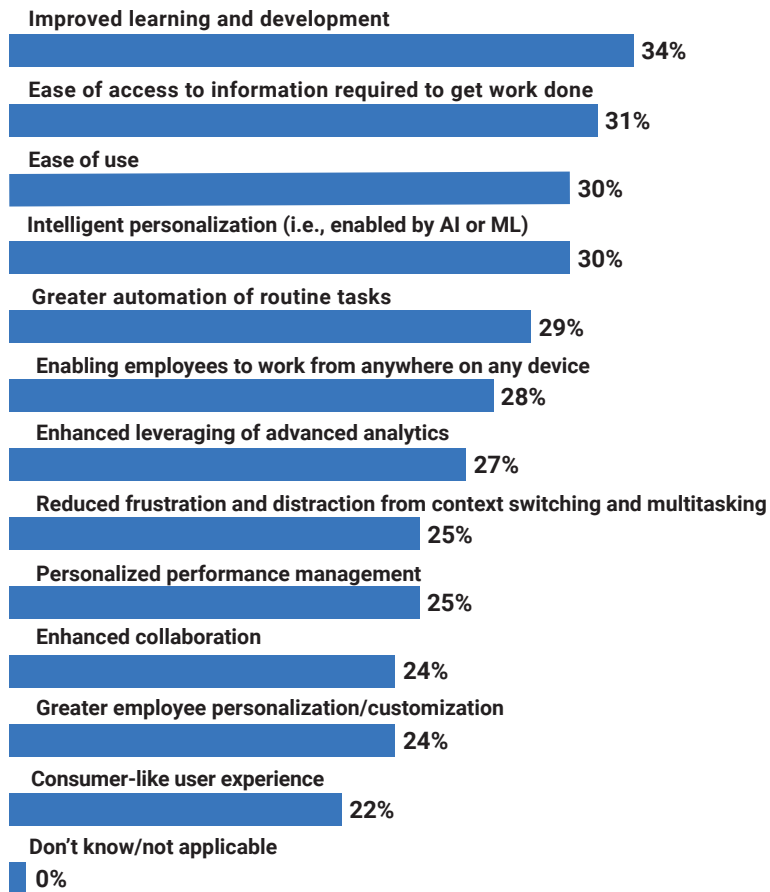
Based on what your organization has already implemented, which of the following capabilities have made the greatest impact on how your organization's employees perform their duties?

### KNOWLEDGE WORKERS

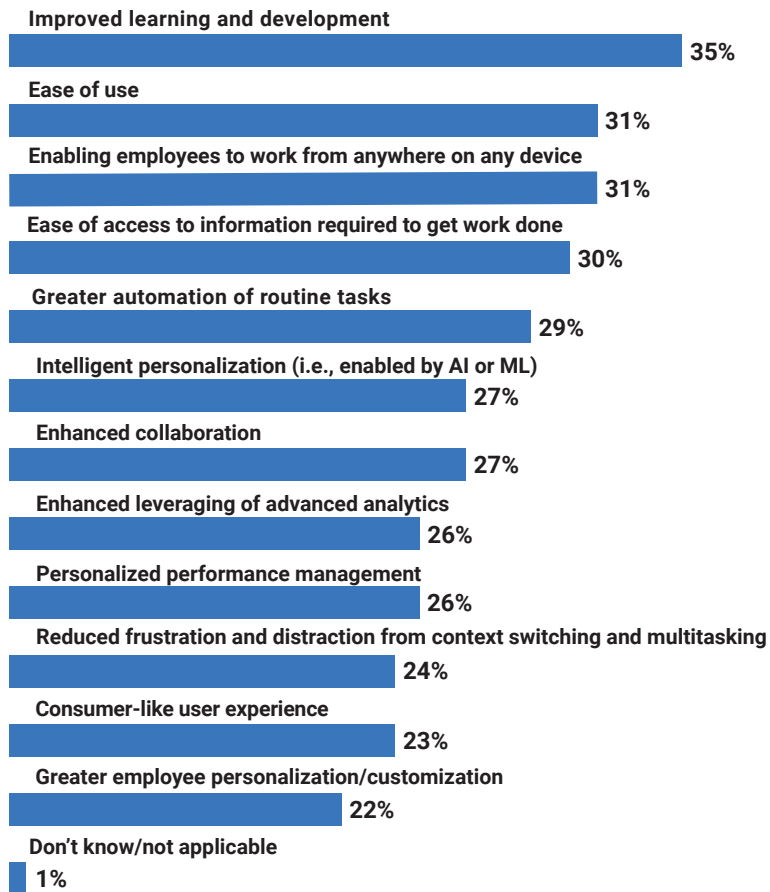




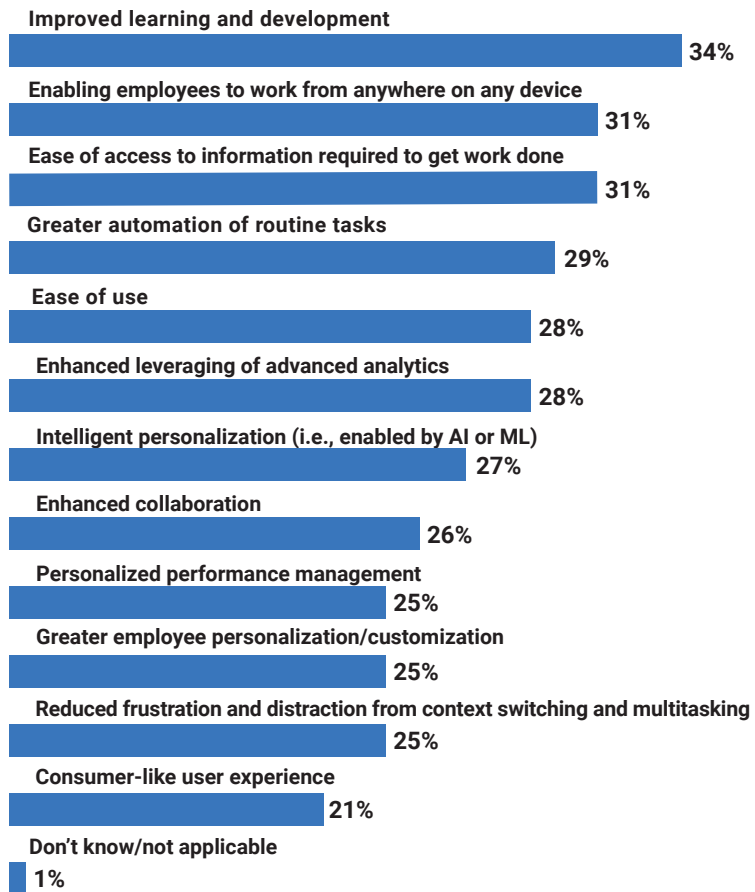
Which of the following emerging workplace technology benefits are most likely to improve your organization's ability to innovate and be creative? Please select up to four.



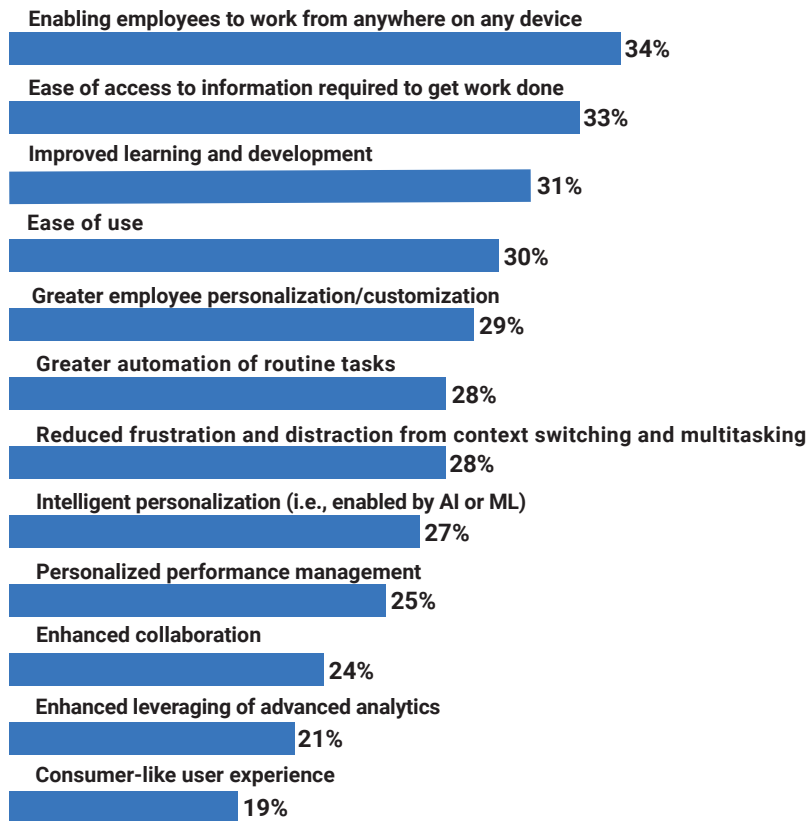
Which of the following emerging workplace technology benefits are most likely to improve your organization's productivity? Please select up to four.



Which of the following emerging workplace technology benefits are most likely to improve the adaptability of your organization's business model? Please select up to four.



In which of the following ways are emerging workplace technology benefits most likely to improve the quality of your employees' work life? Please select up to four.





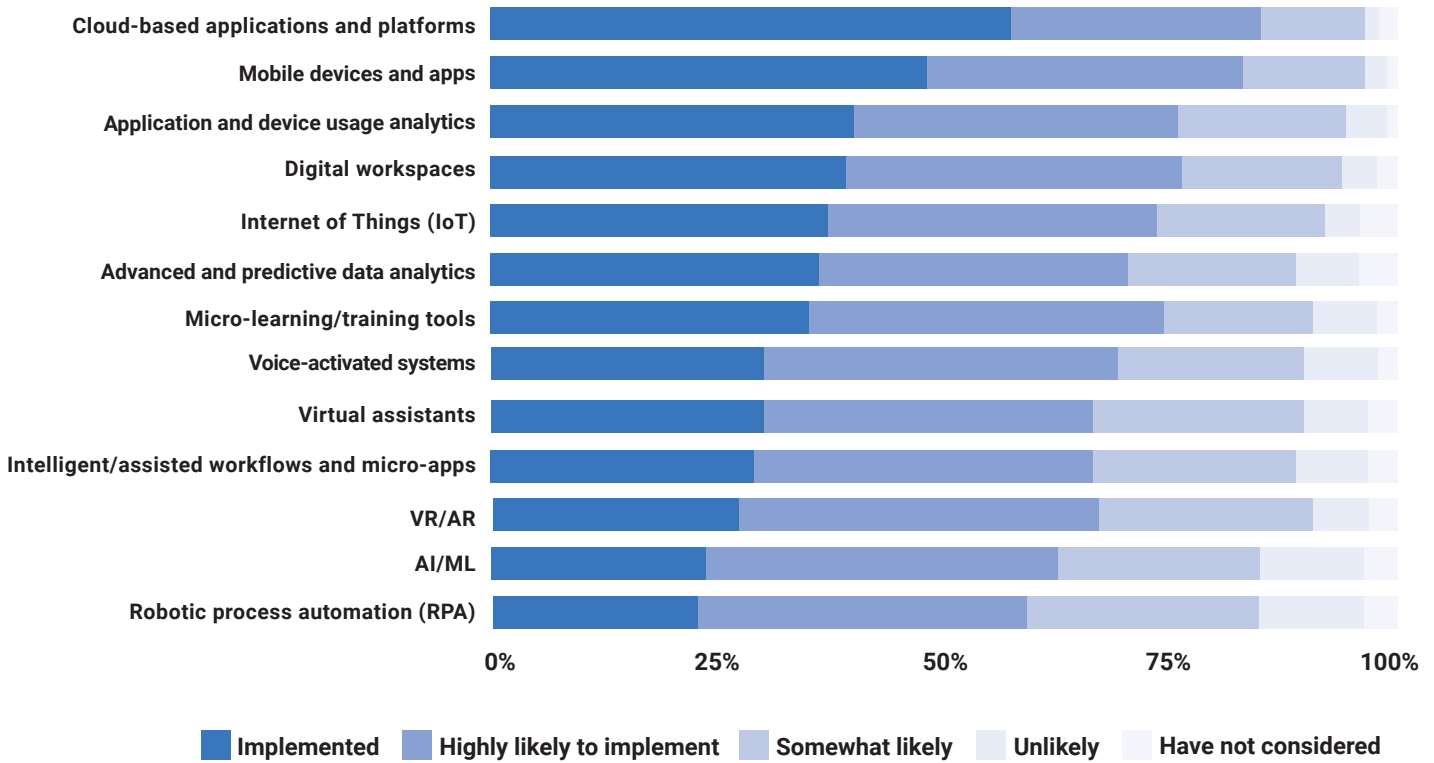
Which of the following benefits of this implementation would be most important for achieving your employee experience goals? Please select up to four.

Most important benefits of emerging workplace technologies for achieving employee experience goals.

Percentage of respondents who are likely to implement each technology who selected each benefit as one of four choices for “most important.”

|   | VR/AR | AI/machine learning | Cloud-based apps | Intelligent workflows | RPA | Virtual assistants | Voice-activated systems | Predictive data analytics | Digital workspaces | App and device analytics | IoT | Micro-learning tools | Mobile device and apps |
|---|-------|---------------------|------------------|-----------------------|-----|--------------------|-------------------------|---------------------------|--------------------|--------------------------|-----|----------------------|------------------------|
| Increased productivity                            | 33    | 35                  | 33               | 31                    | 32  | 31                 | 35                      | 31                        | 30                 | 32                       | 36  | 38                   | 34                     |
| Increased employee work-life balance              | 30    | 28                  | 32               | 30                    | 32  | 29                 | 29                      | 29                        | 30                 | 25                       | 27  | 26                   | 27                     |
| Increased employee creativity and innovation      | 33    | 29                  | 30               | 29                    | 30  | 28                 | 30                      | 28                        | 21                 | 32                       | 26  | 23                   | 26                     |
| Improved processes and greater efficiency         | 31    | 28                  | 29               | 25                    | 28  | 26                 | 29                      | 27                        | 27                 | 24                       | 28  | 28                   | 18                     |
| Reduced costs                                     | 24    | 23                  | 29               | 26                    | 27  | 26                 | 23                      | 27                        | 27                 | 27                       | 23  | 23                   | 26                     |
| Increased security                                | 28    | 25                  | 30               | 25                    | 26  | 24                 | 22                      | 24                        | 27                 | 24                       | 25  | 22                   | 19                     |
| Increased revenues                                | 24    | 29                  | 25               | 25                    | 23  | 29                 | 26                      | 20                        | 19                 | 27                       | 28  | 24                   | 21                     |
| Improved ability to leverage data and analytics   | 26    | 26                  | 21               | 28                    | 19  | 25                 | 23                      | 25                        | 25                 | 25                       | 21  | 24                   | 25                     |
| Enhanced collaboration across depts and functions | 25    | 25                  | 24               | 23                    | 25  | 25                 | 20                      | 23                        | 21                 | 25                       | 24  | 26                   | 26                     |
| Improved customer experience and service          | 25    | 20                  | 21               | 26                    | 23  | 21                 | 21                      | 25                        | 27                 | 25                       | 21  | 25                   | 23                     |
| Quicker uptake of new policies and technologies   | 23    | 22                  | 21               | 21                    | 22  | 22                 | 23                      | 24                        | 26                 | 20                       | 24  | 22                   | 20                     |
| Enhanced ability to rapidly change skill mix      | 21    | 21                  | 22               | 20                    | 23  | 21                 | 22                      | 22                        | 27                 | 21                       | 23  | 23                   | 20                     |
| Improved ability to expand new markets            | 25    | 26                  | 22               | 24                    | 23  | 22                 | 26                      | 22                        | 19                 | 20                       | 18  | 21                   | 16                     |

Which of the following technologies is your organization most likely to have implemented in five years' time to improve your employee experience strategy?  
Please select one from each row.

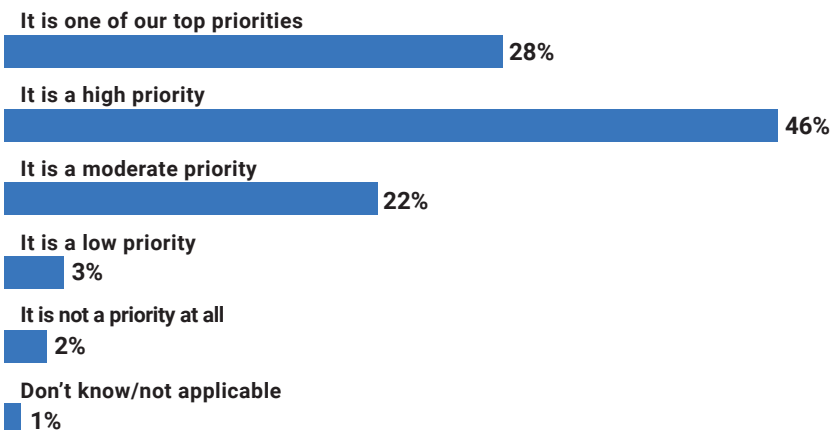


Which of the following presents the biggest obstacle to leveraging emerging technologies to positively impact the employee experience in your organization? Please select up to four.





Please rate the level of priority your organization places on leveraging technology to advance the employee experience.



Please rate the financial value your organization sees or expects from leveraging technology to advance the employee experience.

