Hype Cycle for Hybrid Work, 2023

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Initiatives: Digital Workplace Applications; CIO Leadership of Culture and People; Digital Workplace Infrastructure and IT Operations; Employee Experience; Future of Work Reinvented Resource Center; HR Technology Strategy, Transformation and Management; Midsize Enterprise CIO Leadership

> This Hype Cycle reflects the impact that continued adoption of hybrid work is having on organizations worldwide. It provides a 10-year outlook for digital workplace application leaders and their peers on the top technology innovations and strategies that will shape the future of hybrid work.

Additional Perspectives

- ハイブリッド・ワークのハイプ・サイクル：2023年
  (12 October 2023)

- Summary Translation: Hype Cycle for Hybrid Work, 2023
  (11 October 2023)

More on This Topic

This is part of an in-depth collection of research. See the collection:

- 2023 Hype Cycles: Deglobalization, AI at the Cusp and Operational Sustainability

Analysis

What You Need to Know

Global views on hybrid work best practices and supporting technology continue to evolve in 2023. Over the previous 12 months, the number of employees working in a hybrid way has increased, while the number of employees who work only at home or only in the office has decreased. Ongoing polarization of views on where work is best done and uncertain returns on investments in corporate space have forced hybrid work to descend into the Trough of Disillusionment.

Most hybrid work practices were implemented in haste in 2020, and technology and management strategies from location-centric work do not work well in a hybrid world. Patchwork and piecemeal approaches are limiting the effectiveness of the leadership strategies and technology categories that will help make hybrid work successful. Empathy-based management, workplace experience apps, and the smart hybrid office are critical innovations to accelerate hybrid work out of the trough.

This Hype Cycle acknowledges the cross-functional effort required of organizations to adapt their workstyles to hybrid work by integrating innovations from across digital workplace applications, digital workplace I&O, employee experience, HR technology, the future of work, and real estate research.

The Hype Cycle

More of employees' day-to-day work is digital than ever before, thus enabling them to be remote, but hybrid working has reemphasized the role that the office has to play as a work environment. Employees experiencing a human-centric work design (flexible experiences, intentional collaboration and empathy-based management) are roughly five times more likely to achieve high performance, [1] yet hybrid workplace strategies rarely center around the human experience.

After nearly two years sitting at the Peak of Inflated Expectations, the hype around hybrid work hasn't crystallized, resulting in a rapid descent into the trough. Leaders and employees face the unique challenges of going from a predictable digital-first environment to an unpredictable distributed hybrid environment.

The innovations presented in this Hype Cycle span a wide range of use cases, organization types and functional areas across three broad themes: technology and IT; leadership and culture; and facilities and HR. In addition, this 2023 Hype Cycle introduces 11 new innovations unique to hybrid work to complement 26 innovations shared with other Hype Cycles.

The **technology and IT** theme includes innovations that help organizations succeed with hybrid by understanding how digital technology impacts the overall employee experience, communicating effectively to distributed teams, and ensuring device performance and security. **Three new innovations have been introduced for 2023 to support the unique challenges of hybrid work:**

- Digital employee experience (DEX)

- Appointment scheduling apps

- Employee journey map

The **leadership and culture** theme includes innovations that help organizations succeed with hybrid by supporting equality of opportunity, collaboration and innovation by design, and measuring performance by outcomes — not visibility. **Four new innovations have been introduced for 2023 to support the unique challenges of hybrid work:**

- Empathy-based management

- Digitally enabled DEI

- Intentional collaboration

- Virtually facilitated social connections

The **facilities and HR** theme includes innovations that help organizations succeed with hybrid by defining the value proposition of the office, setting team norms for hybrid collaboration, improving the workplace experience with technology, and ensuring employees are well. **Four new innovations have been introduced for 2023 to support the unique challenges of hybrid work:**

- Hybrid work

- Smart hybrid office

- Four-day workweek

- Radical flexibility/flexible work

Figure 1: Hype Cycle for Hybrid Work, 2023

Hype Cycle for Hybrid Work, 2023
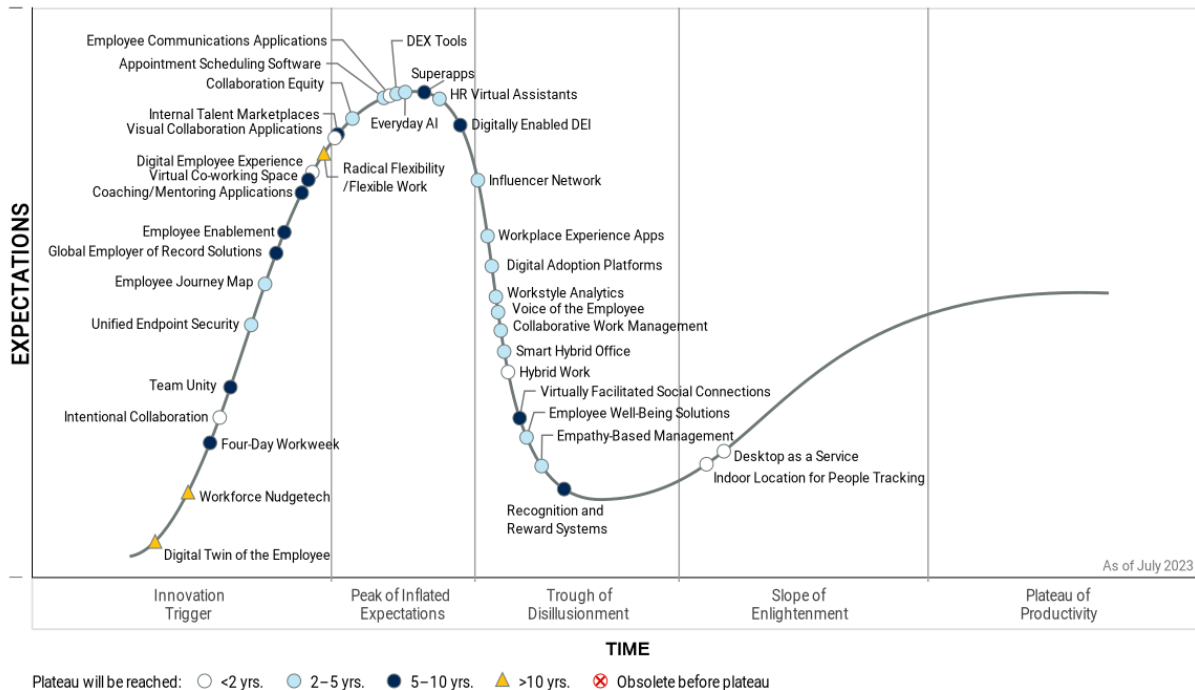
The Priority Matrix

The Priority Matrix maps the benefit rating of each innovation against the amount of time required to achieve mainstream adoption. The depicted placement of each technology and trend reflects an average assessment across all organizations and industries, so positions may vary for your company. Digital workplace application leaders should identify the technologies most relevant to their organization based on specific use cases and circumstances.

Innovations that are rated as "transformational" or "high" over the next five years reflect the greatest need for investment for successful implementation of hybrid work. They indicate a near-term opportunity to deliver better employee experiences and drive greater engagement in the digital and physical workplace. The technologies and strategies represented in these two categories, if applied, will catapult hybrid work out of the trough and up the Slope of Enlightenment.

The 2022 Gartner Digital Worker Survey found that 77% of digital workers want to be a part of planning their hybrid work schedule. Investments in workplace experience applications (WEX) and a smart hybrid office offer the most tangible transformational benefits. [2]

Due to the cross-functional effort involved in hybrid work, many of the innovations featured in this Hype Cycle also appear in Hype Cycles targeted specifically at application, I&O, HR technology and real estate roles.

Table 1: Priority Matrix for Hybrid Work, 2023

(Enlarged table in Appendix)

Benefit	Years to Mainstream Adoption			
↓	Less Than 2 Years ↓	2 - 5 Years ↓	5 - 10 Years ↓	More Than 10 Years ↓
Transformational	Digital Employee Experience Hybrid Work	Everyday AI Smart Hybrid Office Workplace Experience Apps	Internal Talent Marketplaces	Radical Flexibility/Flexible Work
High	Desktop as a Service Employee Communications Applications Indoor Location for People Tracking Intentional Collaboration Visual Collaboration Applications	Collaborative Work Management DEX Tools Digital Adoption Platforms Empathy-Based Management Influencer Network Unified Endpoint Security Voice of the Employee Workstyle Analytics	Coaching/Mentoring Applications Digitally Enabled DEI Four-Day Workweek Global Employer of Record Solutions Superapps Team Unity	Digital Twin of the Employee Workforce Nudgetech
Moderate		Appointment Scheduling Software Collaboration Equity Employee Journey Map Employee Well-Being Solutions HR Virtual Assistants	Recognition and Reward Systems Virtually Facilitated Social Connections	
Low			Employee Enablement Virtual Co-working Space	

Source: Gartner (July 2023)

Off the Hype Cycle

On the Rise

Digital Twin of the Employee

Analysis By: Jason Wong, Helen Poitevin

Benefit Rating: High

Market Penetration: Less than 1% of target audience

Maturity: Embryonic

Definition:

A digital twin of an employee (DToE) is a model you build to understand how real employees will respond or behave in a given context. It's a dynamic, virtual representation of an employee that simulates and learns to emulate and anticipate employee behavior. The DToE is usually based on employee personas, but in some instances, it could be directly linked to an individual employee for specific purposes that benefit the worker.

Why This Is Important

Digital twin technologies support the optimization of digital business. Data about assets, processes, customers, organizational operations and even cities are being virtualized as digital twins to drive better insights and decision making. A DToE is a missing piece in the puzzle for organizations that want to pursue better performance, productivity and impact through a combination of work optimization, autonomy, dynamic networks, quality leaders and improved employee experience.

Business Impact

A DToE can aid in reducing health issues and accidents for employees, particularly those working in harsh environments. It can simulate a body's interactions with its physical environment to improve safety protocols. A DToE can monitor and analyze employee performance, physically or even mentally. Consumers already do this by tracking their sleep, food intake and exercise regimen to optimize well-being. DToE helps improve individual performance and aggregate data for showing trends and shared practices.

Drivers

- The support of connected employees, who already leave a significant digital footprint, will be an early driver of DToE. These employees are supported by advanced insights and point-in-time guidance to onboard and improve performance — most often in work contexts impacted by recent and significant investments in automation, changing the nature of work. For example, this will be the case for the connected rep, and the connected factory worker.

- A DToE is needed to help improve connected employee experience by simulating which information, decisions or actions will help employees tap into intrinsic motivation and have a sense of increased mastery and competence in the execution of meaningful work tasks.

- Employee acceptance and adoption of relevant technology, as well as assistance from works councils, labor law interpretations, and privacy regulations, will ultimately drive a successful DToE. Based on the 2022 Gartner Digital Worker Survey of digital workers from the U.S., China, India or the U.K., the top situations where employees would accept monitoring of their activities, in return for assistance are: (1) making me aware of training classes and/or career development, (2) support in finding information or data to do the job, and (3) proactive outreach from support when I'm having problems with my computer or applications.

Obstacles

- Employee privacy: Organizations may choose to obtain consent, but individual employees may choose to opt out if their perception of privacy risk is greater than the reward of participation. This requires consultation and communication with employees.

- Regulations: Workplace regulations will play a major role in shaping DToEs across regions, industries and employee segments. This requires legal awareness in each jurisdiction ahead of DToE design.

- Data manipulation: DToE data can be misinterpreted or used in ways that negatively impact certain employees which could lead to negative outcomes for them and the organization.

- Fragmented technologies: This capability is not a current packaged solution today. A DToE will require the implementation, integration and orchestration of multiple technologies, such as the voice of employee tools, workstyle analytics, digital employee experience tools and journey analytics.

User Recommendations

- Start with one DToE use case related to safety, performance or well-being which will then inform the technologies needed.

- Focus on utility for employees, where they feel they get value and assistance.

- Map the context, starting with data about work activities, sentiment, workstyle preferences and skills.

- Simulate what actions are most likely to help employees increase their performance.

- Simulate what workspace — physical or virtual — will help them perform at their best.

Gartner Recommended Reading

Innovation Insight: Workstyle Analytics

Market Guide for Voice of the Employee Solutions

Market Guide for DEX Tools

Market Guide for Technologies Supporting a Digital Twin of an Organization

Workforce Nudgetech

Analysis By: Rania Stewart

Benefit Rating: High

Market Penetration: Less than 1% of target audience

Maturity: Embryonic

Definition:

Workforce nudge technology (nudgetech) is a form of AI-enabled choice architecture designed to elicit behaviors aimed at accelerating targeted positive outcomes at the individual, team and/or organizational level. Nudgetech incorporates behavioral economic principles, hyperpersonalized through AI. Nudges come with the freedom of choice and are often based on worker behavior data, including workstyle analytics.

Why This Is Important

Nudgetech can be transformative in its potential to enable high-impact behavioral change, often with low-effort investment by the individual. Nudgetech is seeing traction in leading-edge people development, personal productivity and employee experience applications. Use-case relevancy continues to grow and expand, particularly where desired behaviors are not immediate or certain (requiring greater interpretation, judgment and agency of choice, hence benefiting from nudge guidance).

Business Impact

Nudgetech uses technology to drive small, beneficial changes that are good for employees, managers and the organization. These small changes are designed to effectively compound to scale toward a greater impact on the desired behavioral outcome. And yet these outcomes can be positive, net neutral or even inadvertently negative. Without AI-enabled feedback loops, nudges can backfire and become mass-scale "sludge," deterring progress.

Drivers

- Personalized guidance is invaluable to change, learning and improvement initiatives at every level (individual, team, department, organization). It is simultaneously difficult to scale, due to the combination of required subject matter expertise and contextual knowledge required of the individual and their team/organization.

- The 2022 Gartner Digital Worker Experience Survey found that 26% of workers consider themselves to be either novice or have developing knowledge of the digital technology used for work. Fifty-five percent of these workers struggle to find information or data needed to do their job and 43% admit to having made the wrong decisions due to lack of awareness.

- This scalability challenge drives the value proposition of nudgetech to close the behavioral gap from where you are today to where you ideally want to be tomorrow. The most concentrated workforce-targeted use-case applications observed to date include enabling the following outcomes — agile culture and adaptive teams, inclusion and belonging, manager and leader effectiveness, proficiency with digital tools, security-conscious culture, and well-being and personal effectiveness.

Obstacles

- **Lack of definition:** Nudgetech is not yet sufficiently far along to have a commonly accepted definition.

- **Filter the nudge noise:** A nudge is not a reminder or a notification by itself. Those are common delivery mechanisms that are often, understandably, referred to as "nudges," but lack the systematic rigor of nudge technology.

- **Is it really AI-enabled?:** This can be difficult to uncover, in that the behavioral economics of nudge technology will likely present as more static, decision-tree logic. This should be complemented by AI-driven feedback loops, where the system learns which nudges work better for which people (completion rates) and outcomes (impact tracking).

- **"Sludge" vs. nudge:** Employees may develop "nudge fatigue" from too many nudges or ineffectual or inappropriate nudges that ultimately deter progress.

- **Choice is key:** If there's no option to pass, it is not a nudge, but rather a prescriptive action, which is less effective at sustainable behavioral change.

User Recommendations

- **Prioritize which organizational outcomes may benefit the most from nudge technology.** The ideal fit would be an outcome theme that enables you to start small, with easy but potentially high-impact outcomes (see Create Self-Sustaining Culture Hacks by Applying Nudging Techniques).

- **Experiment selectively with isolated proofs of concept within your own organization.** Depending on available in-house skills and expertise, it may be an option to pursue this as an internal build. Many larger organizations have the requisite data science capability. If yours does not, consider contracting with an organizational psychologist or related firm to create the nudge library.

- **Encourage bidirectional discussions with prospective or existing vendors.** How do you encourage select prospective vendors (or even current ones) to consider the pros and cons of investing in nudgetech? You ask them. You put it on their radar. You encourage bidirectional discussions.

Sample Vendors

Beamery; BetterUp; Digital Attitude; Humu; Perceptyx (Cultivate); Workday (Peakon)

Gartner Recommended Reading

Establish a Security-Conscious Culture Using Behavioral Economics

How to Use Behavioral Economics to Drive Adoption and Save Money in Your Organization

Four-Day Workweek

Analysis By: Emily Rose McRae

Benefit Rating: High

Market Penetration: 1% to 5% of target audience

Maturity: Adolescent

Definition:

The four-day workweek is a flexibility offering that involves a reduced number of days for employees to work. It can be a reduced number of hours (i.e., 32 hours in four days) or a condensed workweek with the same number of hours in a reduced set of days (i.e., 40 hours in four days). Four-day workweek initiatives have been launched to increase flexibility offerings for both frontline workers and location-agnostic workers in various industries and geographies.

Why This Is Important

With an employee base that is frustrated by poor work-life balance and more accustomed to flexible working patterns, organizations are considering different ways to remain competitive and meet employee expectations. When faced with either a 10% raise at one company or a four-day workweek, 63% of candidates responding to the 2022 Gartner Candidate Survey Dashboard said they would choose the organization offering lower pay to access the four-day workweek.

Business Impact

- **Solutions to employee retention and burnout**. Our recent four-day workweek experiment reported a 65% reduction in the number of sick days. Moreover, 71% of employees reported lower levels of burnout, and the likelihood that an employee will quit the organization declined by 57%.

- **Substantive increases in employee productivity.** For industries and markets with strong pressure on efficiency and productivity, four-day workweeks are currently serving as key performance differentiators.

Drivers

- **Pressure for greater efficiency and productivity.** Ongoing supply chain shortages, inflation and talent shortages are forcing all organizations to do more with less. The striking productivity returns from four-day workweek pilots make implementing a four-day workweek an appealing proposition for executive leaders who need dramatic productivity improvements.

- **Talent shortage.** Well-publicized and acutely felt talent shortages are making any opportunity to increase attraction and reduce attrition worthy of at least a serious discussion. When faced with either a 10% raise at one company or an innovative benefit at another company such as a four-day workweek (for the same pay as a five-day workweek), 63% of candidates we surveyed said they would choose the organization offering 10% lower pay but that offers the four-day workweek as an innovative benefit.

- **Fear of being left behind.** Many executives do not believe their organizations could possibly implement a four-day workweek, but they remember thinking the same thing about remote work and being proven very wrong by necessity. Employee preferences for ever-increasing flexibility act as a driving force for executive interest, even in the absence of a world-changing event.

- **Employee demand for flexibility.** Employers mandating rigid work arrangements are facing a significant risk to an organization's employee hiring, engagement, performance, well-being and retention strategies. They are looking to the four-day workweek as an alternative way of delivering flexibility to employees.

- **Reduced costs due to accidents, insurance and safety risks.** Four-day workweek trials have shown that in supply chain and construction, the four-day workweek with reduced hours significantly reduces the rate of employee accidents and injuries. This saves time lost to accidents, insurance costs due to higher rates of injury and reputational damage that can occur if a workplace is known for being unsafe.

Obstacles

- **Change fatigue.** Many organizations feel it is too soon to implement a four-day workweek after such major changes to the workforce from the COVID-19 pandemic.

- **Leader buy-in.** Some leaders are skeptical of ways of working that differ from what is familiar to them.

- **Productivity.** Despite study results to the contrary, some leaders are concerned that four-day workweeks would harm productivity (The Results Are In: The U.K.'s Four-Day Week Pilot, Autonomy).

- **Coverage and business continuity.** When operations require full coverage and maintaining operations, organizations may need to increase headcount so they can implement a four-day workweek without risking coverage.

- **Regulatory barriers.** Regulations, laws and/or union agreements may make implementing a four-day workweek challenging for some organizations.

- **Risk of employee burnout.** For organizations that cannot implement a reduced workweek for regulatory reasons, a condensed workweek will increase the possibility of overwork, burnout and injury in the workforce.

User Recommendations

- Provide a potential alternative to hybrid for leaders who are not comfortable with remote work and want their knowledge workers back in the office. With changing employee expectations, they may be willing to trade off remote work with one more day per week of personal time.

- Set the organization up for long-term success by implementing a gradual four-day workweek program, moving from a five-day workweek to four-and-a-half days before four. This will combat change fatigue.

- Assess your current workforce to decide whether a reduced or condensed workweek would be best for your workforce without disruption.

- Anticipate the executive board's concerns about implementation and propose this as a business decision that aligns with company goals, rather than an HR initiative. Use the program as a solution that helps achieve organizationwide goals.

Intentional Collaboration

Analysis By: Tori Paulman, Graham Waller, Alistair Kidson

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Intentional collaboration refers to an approach where teams think carefully about the modes of collaboration and understand which is best suited for the type of work they are doing and the type of individuals they are. Teams who collaborate intentionally adapt the structure, timing, and cadence of their meetings or synchronous working time based on the intended outcomes. These teams also determine which mode of work to use based on ongoing needs.

Why This Is Important

Unprecedented demand for work flexibility has redefined the team experience, particularly how employees collaborate. As organizations navigate increasingly complex and fragmented work environments, effective collaboration is essential. The fracturing of the employee experience brought by years of remote work — and now hybrid work — requires all leaders to support employees in developing the capabilities, mindsets and practices that drive high individual and team performance.

Business Impact

Ninety-six percent of HR leaders say they will adopt or have already adopted a hybrid plan for those who can work in that way. However, rather than embrace the expanded new ways in which employees can work with one another, some leaders may default to the prepandemic collaboration norms that no longer effectively serve their teams. The 2022 Gartner Digital Worker Survey found that 77% of digital workers want to be part of planning hybrid work patterns.

Drivers

Employees collaborate in four modes, based on whether they are colocated or distributed and whether they are working synchronously or asynchronously. Prepandemic employees operated in a mostly colocated fashion, and this manifested as two modes of work:

- Working "together, together," synchronously and colocated (e.g., in meetings on-site)

- Working "alone, together," asynchronously and colocated (e.g., at their own desks)

During the pandemic, most employees shifted to a remote model, which meant they worked primarily in the two distributed modes:

- Working "together, apart," synchronously and distributed (e.g., in virtual meetings)

- Working "alone, apart," asynchronously and distributed (e.g., in their own homes, separately from co-workers)

Leaders of hybrid teams must support teams in navigating all four collaboration modes by learning to use the guiding principles of intentional collaboration to drive business success:

- Helping teams achieve outcomes by determining the collaboration mode best suited to the work they are doing and the type of individuals they are. These teams will need to plan which work must be done synchronously, adapt the structure of their meetings based on desired outcomes, and reassess on an ongoing basis as needs change.

- Helping balance team needs with individual needs, and reviewing regularly to verify everyone's needs are met and enact needed adjustments. These teams are diligent about sharing the visibility of their work patterns and accommodating others' working preferences.

- Helping hybrid employees interact more often and more intensely with the people they work with directly ("strong ties"), while also enabling them to be more effective with those they do not ("weak ties"). These teams must be encouraged to set their own behavioral norms, choose their own values, and foster a strong team culture.

Obstacles

- Many business leaders still believe teams need to return to the office to generate innovative work.

- Without intentionality, employees use the different modes in ways that uniquely suit them. As a result, employees on the same team may go into the office on different days or schedule meetings at times that are not compatible with the group as a whole. This may inaccurately paint hybrid work as ineffective rather than demonstrate the demand for intentionality.

- Leaders used to setting a top-down macroculture fear that connection to overall organizational culture may suffer if teams' behaviors are not uniform. Without the visibility and togetherness of sharing the same physical space, they feel they have less control, and "culture" is an easy rationalization for trying to regain that control.

- The majority of leaders learned to manage people in an office environment, where their employees were visible by default.

User Recommendations

- Increase employees' intentionality by coaching them on the value of different modes of collaboration and how to use the modes best suited to different work types and individuals.

- Develop an organizational mindset of reciprocity by giving employees tools and guidance to improve the visibility of their work patterns.

- Build an environment of autonomy by embracing and championing teams to set their own behavioral norms for collaboration and optimize their microcultures.

- Recruit an employee champion community of practice to create a toolkit for teams to use that guides discussion about team collaboration habits and socializes intentional collaboration team principles.

- Investigate workplace experience applications that can help employees plan the best days to collaborate synchronously and colocated in the office.

- Leverage capabilities built into work hubs such as Google Workspace or Microsoft 365 that help employees plan and implement intentional collaboration seamlessly across all four modes.

Gartner Recommended Reading

Team Collaboration Attributes That Drive High Performance

Quick Answer: How Can the Digital Workplace Cultivate Team Unity?

Developing Skills for the Hybrid World

Market Guide for Workplace Experience Applications

Why Microcultures Win in the Hybrid World

Team Unity

Analysis By: Mike Gotta

Benefit Rating: High

Market Penetration: 1% to 5% of target audience

Maturity: Emerging

Definition:

Team unity (TU) is a collection of work and social practices needed to promote productive and collaborative teamwork. Team connections focus on relationships within the group. Team health focuses on well-being. Team identity focuses on group purpose and shared values. Collaboration equity focuses on participation parity in all areas of team engagement. A mix of etiquettes, behaviors, coaching and leadership practices is needed to influence cohesion and solidarity.

Why This Is Important

Collaboration and organizational development strategists have long sought reliable ways to create high-performing teams that achieve superior business results. With hybrid work now mainstream, distributed teams face unique hurdles. It is challenging for members to stay focused, participate equally and build social connections if the group lacks cohesion, trust and shared identity. TU drives engagement and motivation, contributing to higher performance.

Business Impact

TU affects business results by influencing talent retention, employee engagement and organizational alignment. TU helps by:

- Enabling employees to feel more connected to team cohorts regarding work practices and social connections.

- Providing a framework for discussions on collaboration expectations and practices.

- Driving team leadership, team building and cross-team networking.

- Focusing on well-being and participation parity, which makes it valuable to HR, and supporting collaboration equity.

Drivers

- TU addresses the permanency of hybrid work styles that make it challenging for teams to maintain the type of cohesion found when they work together in the office. TU is still relevant to those remote workers who are far-flung or otherwise not part of a hybrid strategy.

- Business transformation requires teams to collaborate in a dynamically changing work environment, where quickly establishing and maintaining team unity is important to continue delivering business results. This applies to colocated teams, remote teams and hybrid teams.

- Employee experience and engagement can be negatively impacted by poor team unity, leading to suboptimal team performance, talent retention concerns and other issues.

- HR groups are concerned over workers feeling disconnected from the organization and to each other, raising the priority of TU as a discipline for leadership practices, including team managers.

- Managers responsible for teams containing hybrid or remote staff must take steps to establish and maintain team unity. This is a core competency expected of managers, to ensure effective leadership and consistent results.

- Organizational development leaders can be a key stakeholder for TU as a means to encourage co-creation, self-direction, autonomy and shared decision rights.

- Gartner's digital worker experience survey found that workers would prefer to spend only 18% of their time in hybrid meetings, and only 17% of workers believed that hybrid meetings are productive to meet business goals. Meanwhile, 46% believed in-person meetings were productive, and 23% believed in the productivity of virtual meetings with audio and video.

Obstacles

- IT, HR and business leaders often disagree about whether team unity is already addressed by other managerial and community-building practices. Some may perceive less of a need for TU.

- Workers may perceive that efforts to improve team unity are not authentic, unless they align with broader cultural practices that value employees.

- Workers may be concerned that activities and practices to enhance team unity are a distraction from "real work."

- TU is not aligned to a single technology. TU-related tools span various markets — such as social recognition, feedback polls, watercooler interactions, gamification — making it difficult for IT to make recommendations without understanding the context.

- TU practices may introduce subjective, nonfunctional requirements that IT may struggle to address.

- Different teams may require different mixes of TU tactics, making it difficult for team leaders and other stakeholders to codify best practices.

User Recommendations

- Consolidate requirements and align collective goals by collaborating with HR, business leaders and digital workplace strategists.

- Survey team leaders to find out their concerns, practices and suggestions.

- Avoid a technology-first approach by understanding how to sustain team unity over time and at scale, before promoting fixes such as watercooler interactions or icebreakers.

- Minimize risk by mentoring and coaching team leaders about issues raised by remote and hybrid work, and socialize ways to get started with TU efforts.

- Ensure TU has value by examining ways to correlate improvements to business outcomes. When uncertain, use parallel pilot projects to A/B test ideas in order to discover what works.

Gartner Recommended Reading

Collaboration Equity Helps Build Team Unity and Improve Performance

Unified Endpoint Security

Analysis By: Chris Silva, Franz Hinner

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Emerging

Definition:

Unified endpoint security (UES) is a strategic architecture that integrates endpoint operations and endpoint security workflows and tools, which helps to create a complete risk identification, analysis and remediation cycle. UES results from the integration of selected capabilities from unified endpoint management (UEM) tools and endpoint protection (EPP) including endpoint detection (EDR) and mobile threat defense (MTD) tools.

Why This Is Important

Endpoint protection tools can thwart exploits before the device vulnerability is even remediated, but many cannot resolve the underlying misconfiguration, missing patch or update.

UES architecture is the lining of unified endpoint management and EPP tools and workflows, incorporating live, contextual threat intelligence to prioritize patches and remediations for managed endpoints. EPP protects vulnerable systems and informs UEM, which repairs the underlying issues via scheduled maintenance.

Business Impact

Integration of EPP threat intelligence into the endpoint operations process improves:

- Risk-based patching by the UEM and configuration prioritization.

- Consistency of endpoint configuration and patch compliance, though the integration of endpoint protection and unified endpoint management tools.

- Proactive, accurate risk calculation through integrating UEM and EPP tools to continually vet endpoint configuration.

Drivers

The 2022 Gartner Security Vendor Consolidation XDR and SASE Trends Survey, found that 75% of organizations are actively pursuing a security vendor consolidation strategy, an integration that helps create:

- Norms for when and whether things like automatic risk remediation — in the form of a patch or update — should be undertaken.

- Automated, risk-aware endpoint posture protection that follows the user, in contrast to network-based controls and restrictions, often moot for workers accessing SaaS applications off-network.

- Defensible patch metrics centered on risk, not completeness, to actively reduce endpoint attack surface.

Obstacles

- A multivendor environment that requires manual integration of tools. These integrations increase maintenance and support complexities.

- Choosing a consolidated set of tools from a single vendor will raise dependence on this vendor and may lengthen the process of seeking replacements if pricing or other engagement details change.

- Gartner estimates it will take two or three years before this technology crests the peak of the Hype Cycle, with ownership of the operations and security domains separated in many organizations, making unified planning difficult.

User Recommendations

- Assess the potential for integration between EPP and UEM and seek to achieve a one-way integration between the two to improve prioritization of patching.

- Investigate organizational capabilities to implement near-real-time endpoint patch or configuration change remediations are possible; if not, modernizing endpoint management is the first step to take.

- Consider the use of UES architecture to drive other dynamic security outcomes such as integration of UES risk data to be used in dynamic SSE/ZTNA access decisions.

Sample Vendors

BlackBerry; IBM; Ivanti; Microsoft; Sophos; Syxsense; Tanium; VMware

Gartner Recommended Reading

Magic Quadrant for Endpoint Protection Platforms

Guide to Endpoint Security Concepts

Employee Enablement

Analysis By: Tom Cipolla, Dan Wilson

Benefit Rating: Low

Market Penetration: Less than 1% of target audience

Maturity: Emerging

Definition:

Employee enablement is an IT strategy focused on empowering employees with the tools, support and skills required to increase digital dexterity and self-sufficiency. This reduces dependence on the availability of IT support staff to address basic issues and reduces digital friction and increases productivity.

Why This Is Important

Hybrid work and the increasing rate of technology change are overwhelming IT teams, making it hard to keep pace with demand. Enabling employees to become more digitally dexterous and self-sufficient is key for organizations to scale their internal services without additional headcount.

Business Impact

It is critical to break the culture of IT dependency to increase capacity and transform from a reactive control-based organization into an enabling organization. Specific impacts include:

- Expanded employee self-sufficiency and digital dexterity.

- Improved experience and reduced operational workload due to automated resolution of repetitive and often unreported issues.

- Increased employee IT satisfaction and retention by removing barriers that cause digital friction.

Drivers

- The increased cadence of technology updates and application deployment volume has overwhelmed IT's ability to keep pace with demand.

- Digital employee experience (DEX) is now a critical component of and primary determinant of overall employee experience.

- Employees' view of their proficiency with technology is increasing. Over 74% of digital workers considered themselves either proficient or experts within the 2022 Gartner Digital Worker Survey.

- Traditional training methods and materials are significantly less effective than enablement practices that use proven organizational change leadership principles.

Obstacles

- Legacy, control-based IT cultures that prefer that "users" only do what they are told.

- IT leaders that lack empathy for employees are less likely to accept responsibility for employee enablement and their role in improving DEX.

- Employee experience improvements are not prioritized by the organization or IT.

- IT leaders measure value based on employee dependence on their teams for basic needs and the volume of activities they perform rather than on their teams' overall business impact.

- Organizations with legacy or siloed operational models will struggle to enact the IT-wide holistic improvements needed to better enable employees.

- ROI of employee enablement is difficult to measure since the benefits of employee self-sufficiency are mainly subjective.

- Underestimation of employees' capacity to support themselves or a lack of trust that they will be successful.

- Failure to incorporate employee feedback into the change planning cycle or viewing feedback through an IT-centric mindset.

User Recommendations

Employee enablement is in the Hype Cycle for the second year and is currently positioned on the rise. Slow, but steady movement through the Hype Cycle is expected. To successfully enable employees, leaders should:

- Strengthen organizational support by championing the importance and value of employee enablement and gaining buy-in from executive leadership.

- Develop a comprehensive strategy by establishing an enablement team co-chaired by digital workplace and HR leaders, supported by global learning, corporate communications, facilities, operations, finance and legal.

- Improve employee experience and reduce digital friction by making DEX a core tenant/pillar of your enablement strategy.

- Strengthen technology communications and feedback loops by building an influencers network.

- Uncover hidden insights in harsh or critical feedback by taking an empathetic view of the employee experience.

Gartner Recommended Reading

Employee Enablement Is Key to Digital Workplace Services Leaders' Survival

How to Build and Manage a Digital Workplace Influencers Network

What Workers Want: Top 10 Insights From the Digital Worker Experience Survey

Global Employer of Record Solutions

Analysis By: John Kostoulas, Nicole Paripurana

Benefit Rating: High

Market Penetration: 1% to 5% of target audience

Maturity: Emerging

Definition:

Global employer of record (EoR) solutions help organizations hire and manage workers in a new geography, without the latter having to set up a legal entity in each country. The EoR provider becomes the full legal employer of the workforce and assumes all employer-related responsibilities and tasks on behalf of their customers.

Why This Is Important

Global EoR solutions are quintessential when organizations seek to quickly expand in new markets without having to incur the upfront cost of setting up a legal entity and hiring people to perform HR and other administrative activities. More recently, talent shortage around specific skills (e.g., technology, programming, graphic design) and broader adoption of remote work enabled organizations to broaden their talent reach beyond their existing or planned operations and associated legal entities.

Business Impact

The most important piece of business impact is legal compliance. Organizations do not need to spend time understanding and applying various country-specific legal frameworks that only apply to a few workers at a time. In addition, their expanded outreach for talent is beneficial to quickly acquire critical skills and enhance diversity (often at a lower cost too). Finally, organizations can offer more options for flexible work locations to all employees, when the nature of the job allows, which increases employee engagement and retention.

Drivers

- **Scarce skills give rise to borderless talent**: Recruiters increasingly embrace borderless recruiting in response to these changes in the global market for talent and continuing skills shortages in the market. As per the 2022 Gartner Borderless IT Workforce Survey, most executives (85%) express interest in working with a borderless workforce, with 58% having actually implemented such a model to some extent. The pandemic is clearly an accelerator of borderless hiring, recently reflecting a significant increase, with 31% of organizations reporting adoption during the past three years up from 25% reporting adoption more than three years ago.

- **Rise in demand for flexibility:** In the 2022 Gartner Candidate Survey, when comparing job offers, candidates are likely to give up an offer with a 10% pay increase for an offer with greater flexibility in when they work (51% of employees) and where they work (47% of employees). And when location flexibility is combined with other flexibility aspects and broader autonomy over work (human-centric work model), it is 3.8 times more likely for an organization to have high employee performance, 3.2 times more likely to have high intent to stay and 3.1 times more likely to have low fatigue than when these aspects of human-centric work are not present.

- **Volatile economic and political conditions call for agile business expansion strategies**: Gartner research shows that 77% of enterprises now review their strategy at least twice per annum, with 37% adjusting their strategy at least twice yearly. New market expansion or operating model changes are often on the table, but these activities need to be executed quickly while optimizing the associated cost base. Alternatively, the decision to withdraw from or downsize presence in specific markets is often unavoidable but can incur significant costs due to existing legal and administrative setup when an entity is owned versus the accommodation offered by an EoR.

Obstacles

- Organizations often fail to create the same conditions for employee experience, inclusion and belonging as with those workers they directly employ. This impacts the engagement and retention of EoR-managed workers.

- While all providers manage legal compliance and administrative aspects, organizations often need extended capabilities in recruiting, onboarding, compensation or other aspects of employment that an EoR may not support appropriately.

- In addition, providers often depend on in-country partners for some services (e.g., payroll services). When in-country partners are not seamlessly integrated, the result is suboptimal service and employee experience.

- Typically, global EoR providers would use their own proprietary platforms to manage administrative activities in their service scope, while the employer organization would use other systems for performance management, talent management and daily work. This variance creates risk of inconsistent HR support or employee experience and gaps in related workforce/talent insights.

User Recommendations

- **Define workforce needs in connection with business requirements:** Tight connection between business planning and workforce planning is critical to spot cases where a global EoR needs to be considered early. For example, the scarcity of talent to fulfill specific roles is often underestimated during planning.

- **Consider the plan and subsequent steps in the evolution of global EoR usage to gradual establishment of an owned entity:** Very often, utilizing the services of a global EoR provider is a temporary step until a specific employee threshold (typically around 50-100 employees) is reached to set up a local legal entity. It is important to have such checkpoints included in your roadmap and your contractual process with the providers (e.g., minimum scope or contract early termination clauses).

- **Define your service priorities and map them to the operational model of each provider:** Having clarity in what scope of services matters to you the most (e.g., payroll compliance vs. recruitment) will make the global EoR selection and ongoing partnership more harmonious and operate with less friction.

Sample Vendors

Atlas Technology Solutions; Deel; Globalization Partners; Lano Software; Neeyamo; Omnipresent Group; Papaya Global; Remote Technology; Safeguard Global; Velocity Global

Gartner Recommended Reading

Market Guide for Multicountry Payroll Solutions

Define Your Borderless Entry Strategy to Attract Scarce Technical Talent and Address Skills Shortages

9 Steps to Improve RFP Effectiveness and Optimize HR Outsourcing or Implementation Vendor Proposals

Coaching/Mentoring Applications

Analysis By: Laura Gardiner

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Emerging

Definition:

Coaching and mentoring applications provide a set of tools to maximize the effectiveness of a corporate mentoring or coaching program. These tools are used by the two sides of the coaching/mentoring arrangement (coaches/learners, mentors/mentees), as well as by HR and line managers.

Why This Is Important

Coaching and mentoring applications enable the optimal program, matchup, execution of sessions, auxiliary resources and reporting/analytics. As use cases quickly expand to include diversity, equity and inclusion (DEI), reverse mentoring from early career employees and entire teams or new hires, so does the importance of scalability and the need for technology support.

Business Impact

The democratization of coaching/mentoring can be transformational for the development and engagement of the workforce. Therefore, we expect these programs to expand rapidly and become a substantial part of the development cycle for the entire workforce. For areas such as middle management, coaching/mentoring can soon become a standard expectation from employees, but expectations are gradually increasing across both individual contributor roles and within teams.

Drivers

- Coaching and mentoring have been applied in the corporate world for years, but with a narrow focus (typically covering senior executives) and through internal resources, small service firms or individuals. The last few years have seen increasing demand to expand mentoring and coaching across the workforce, particularly for middle managers. This is often referred to as the democratization of coaching/mentoring.

- With permanent remote and hybrid working arrangements in place, coaching and mentoring have now become essential for employee connectedness and belonging. However, these programs can be susceptible to proximity bias with consequences for the inclusion of diverse employees in coaching and mentoring programs.

- As formal and informal coaching and mentoring programs are increasingly used for development, they must be integrated into the overall development process.

- HR is facing challenges to ensure the scalability of corporate coaching and mentoring programs. These now include thousands of potential matchups, thousands of sessions, and a diverse range of development objectives (as well as integration into other learning, development and performance management activities).

- HR and line managers also need better metrics that display the connection between the time invested, cost and the impact of these coaching/mentoring arrangements and the overall program.

- On top of technology, organizations might require a pool of external coaches or mentors, as well as services to help with the optimal design and launch of these programs. Organizations with specific language and geographic requirements can also use these applications to connect their own pool of approved external coaches and mentors to opportunities.

Obstacles

- Most vendors cover one of the two areas, so the category effectively contains two subsegments: one for mentoring and one for coaching applications.

- Only a few vendors have achieved scale, particularly in the mentoring subarea.

- For coaching applications, the quality of coaching services and the effectiveness of the corresponding vetting process of external coaches by the vendor are paramount.

- Gaps in regional or language coverage still exist, particularly for coaching that requires a pool of coaches per location/language.

- Reporting and analytics lack depth, which hinders HR's ability to make decisions to continue, suspend or expand coaching/mentoring programs.

User Recommendations

- Establish scalability of the coaching/mentoring vendor solution as an important assessment criterion, as programs can quickly expand, particularly in large organizations.

- Check overlaps with incumbent adjacent vendors. Some talent management applications, and more recently human capital management (HCM) suites, include mentoring features.

- Check that vendors have a multistage vetting process for hiring coaches as well as a quality control process (including learner ratings) to use for coach retention decisions.

- Evaluate content and advice offered by the vendor to help drive quick program adoption, particularly for programs related to a specific topic (e.g., DEI mentoring and group coaching).

- Assess multilingual and regional capabilities of candidate vendors, to allow for fast expansion of your programs across multiple locations.

Sample Vendors

BetterUp; Chronus; CoachHub; EZRA; MentorcliQ; PushFar; Skillsoft; Sounding Board; Together; Torch Leadership Labs

Gartner Recommended Reading

Innovation Insight: Continuous Employee Listening and Talent Management for Increased Agility

Innovation Insight for Digitally Enabled Diversity, Equity and Inclusion

Unlocking Mentoring for Development Impact

Employee Journey Map

Analysis By: Lane Severson, Tori Paulman

Benefit Rating: Moderate

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

An employee journey map is a visual representation of the steps an employee goes through, and the touchpoints with an organization, to reach a goal. It follows the flow of events and presents, from the employee's perspective, the story of their journey with its highlights and challenges.

Why This Is Important

An employee journey map is an approach for assessing where digital friction is causing employees to experience emotional highs or lows, and can help align our employee experience strategy to the actual emotional reality of the employee. By developing rich, human-centric journey maps, we can ensure that we have taken the time to fully empathize with the employee.

Business Impact

Employee journey map is a powerful tool for improving employee experiences and can influence metrics like intent to stay. Gartner's 2022 digital worker survey shows that 74% of workers say they intend to stay with their current organization for the next three years. But when employees are net detractors, meaning that they do not believe they are working with modern technology and an engaged IT staff, intent to stay plummets to 58%.

Drivers

- More work is being done digitally than ever before. IT and business leaders are equally invested in improving their understanding of the digital employee experience using journey maps.

- Journey maps have become a popular topic over the past year as employee experience teams look to improve their approach to hybrid work.

- Employee workstyles and behavior is changing quickly and IT organizations need to be able to adapt and serve the needs of employees based on those changes.

- Journey mapping identifies opportunities for improvement in the employee experience that fall between the scope of departments, such as facilities, human resources and IT.

- Companies are taking principles of customer journey mapping and adapting them for employee journeys. They are looking to improve their employee onboarding process and journey mapping, and consumer-facing best practices for attracting and retaining customers.

Obstacles

- Only a few have a deep understanding of the methodology and how to apply it. Some training and experience is needed to ensure that quality journey maps are developed.

- Many IT application groups are yet to make the move to more human-centric design methodologies, and are often stuck in project/requirements methodology. Employee journey map is not just a simple add-on to projects and requirements, it requires a change in the overall design approach which is often difficult for organizations.

- The employee journey map must be used by everyone, from the business side to the IT side, the employee's "story" must be a common guide to everyone involved. There will be multiple maps for employee journeys. But the artifact should be shared across business units. This requires closer collaboration between different team members from business and IT, and a focus on shaping a story everyone understands. This can be challenging where business and IT, at a fundamental level, don't understand each other.

User Recommendations

- Provide IT and employee experience teams training in journey mapping by conducting guided journey mapping workshops. It is often helpful to bring in an outside organization with experience in the area to do this training for you.

- Practice developing journey maps and telling the "story" from the employee's perspective by sharing the draft journey map with employees and including their feedback.

- Whenever possible, fill in knowledge gaps using sources that you already possess, such as voice of the employee, human capital management, sentiment analysis and other systems with employee data.

Gartner Recommended Reading

Tool: Digital Employee Experience Journey Maps

Deliver Peak Digital Employee Experience Excellence in 4 Steps

How to Run a Customer Journey Mapping Workshop

Digital Employee Experience

Analysis By: Lane Severson, Tori Paulman

Benefit Rating: Transformational

Market Penetration: 5% to 20% of target audience

Maturity: Emerging

Definition:

Digital employee experience (DEX) is a discipline that focuses on how technology affects the overall employee experience (EX). With work becoming increasingly dependent on digital technologies, organizations must embrace experience-focused methods, such as personas, journey mapping, measurement and listening, to deliver an experience that boosts digital dexterity and personal growth, builds team unity, and helps employees achieve organizational goals.

Why This Is Important

Employees spend more of their time working digitally than ever before; the digital experience affects the overall employee experience. Digital experiences make up most employee experiences, but 66% of employees experience moderate to high digital friction when using technology. On an average, employees must use 11 applications to do their work, with 36% using 11 to 25, and 5% using more than 26.

Business Impact

A holistic, coordinated approach to DEX across IT and with non-IT partners can minimize digital friction and maximize workforce digital dexterity and well-being. IT teams delivering great DEX improve their organization's talent retention, team effectiveness and process efficiencies, and adopt new ways of working. DEX significantly impacts a workers's intent to stay, with 82%, who believe they work with modern technology and engaged IT staff, intending to stay and/or grow within their organizations, compared to only 58% who do not.

Drivers

- Companies look for every advantage to attract and retain talent. Organizations must go beyond providing modern technology and services to deliver digital experiences that meet a diverse set of employees where they are in their digital workplace maturity and alignment with digital workplace ambitions.

- As foundational digital workplace technology is standardized across organizations, IT leaders are looking to provide differentiation by the way they facilitate the customization of tools to roles and processes in the organization.

- Persona, journey mapping, user experience (UX) design and design thinking are being used to ensure technology investments have a positive impact on both DEX and EX.

- Business leaders are increasingly looking for guidance on how technology can help address key strategic concerns around employee productivity, engagement experience, well-being and skills development, as well as organizational alignment.

- IT leaders are increasingly investing in DEX tools that collect and combine qualitative measurement (employee feedback) with quantitative measurement (performance, stability and use) of technology, and leverage automation and employee engagement to improve DEX.

Obstacles

- Building a business case for DEX is difficult. Common measures are subjective and benefits can't be directly attributed to DEX initiatives.

- Cost to acquire, implement and integrate technologies to improve DEX.

- DEX requires shifting from activity- and service-based to new experience- and value-based measures of success.

- The human-centric nature of DEX may not be appreciated by technology-centric IT leadership and staff.

- Low-maturity organizations may not be ready for DEX, because their focus remains on basic IT operations concepts (for example, IT service management [ITSM], endpoint management and technical debt reduction).

- Clients often cite lack of IT leader and staff skills to pivot focus toward experience development. Most organizations still do not see this as a part of their remit.

- Because DEX and EX are directly linked, if IT and HR (who owns EX) are not collaborating, success in improving either will be impaired.

- Organizations facing staffing reductions may not have the resources to invest in DEX leadership, staffing or technology.

User Recommendations

- Make the digital workplace the central point of coordination for all DEX activities.

- Align key partners in EX, HR and facilities, along with business leaders, by expanding the employee value proposition (EVP) to include DEX.

- Focus DEX initiatives by creating employee personas and prioritizing high-impact roles first. These may include revenue generating roles, customer service or product development.

- Identify key moments in an employee journey such as "the first day at work" or "return to the office" to improve, as opposed to attempting to change, the entire onboarding process.

- Combine personas and journey mapping to catalyze identification and reduction of digital friction points.

- Combine objective data from DEX, or other monitoring and management tools, with subjective data from employee listening and voice of the employee programs to guide DEX initiatives.

Gartner Recommended Reading

Deliver Peak Digital Employee Experience Excellence in 4 Steps

Tool: Digital Employee Experience Journey Maps

Innovation Insight for the Digital Employee Experience

Virtual Co-working Space

Analysis By: Christopher Trueman

Benefit Rating: Low

Market Penetration: 1% to 5% of target audience

Maturity: Emerging

Definition:

A virtual co-working space (VCS) is a real-time collaboration tool that supports interactions over a network between team members to more closely approximate a real-world office experience. VCSs are often positioned as creating a "virtual office" environment by using always-on meeting rooms/channels with rich presence or gamified, social spaces to connect colleagues via video. In this way, VCSs make video an omnipresent part of the work environment.

Why This Is Important

Virtual co-working spaces emerged from the meeting solutions market in response to the unique needs of remote/hybrid workers. VCSs' persistent video channels or gamified virtual office spaces better enable ad hoc collaboration. VCSs promote more social and collaborative work styles and encourage spontaneous meetings — the virtual equivalent of chatting to someone in the office. Most organizations should treat a VCS as a complement to, not a replacement for, existing meeting solutions.

Business Impact

VCSs add new ways to engage remote/hybrid workers. They are useful for IT leaders and managers seeking to increase social collaboration and foster team unity. This engagement style can:

- Build team unity

- Mitigate feelings of isolation

- Raise intent to stay

- Improve responsiveness

- Foster serendipity

- Create more productive work styles

Teams spread across different time zones (i.e., more than four to five hours difference) will see a reduced impact due to VCSs' reliance on real-time communication.

Drivers

- Workers ranked virtual meetings as less productive than in-person meetings, but more productive than hybrid meetings. The 2022 Gartner Digital Worker Survey shows they would prefer to spend 48% of their time in virtual meetings, 35% of their time in-person, and only 18% of their time in hybrid meetings, on average.

- Organizations know video meeting tools are fundamental to maintaining productivity and team cohesion in a hybrid or remote-first work environment.

- Meeting solutions allowed structured and planned collaboration activities to continue, but spontaneous real-time interactions have proven difficult to replicate. As a result, IT leaders and managers have explored alternative solutions, such as VCSs.

- VCSs provide new capabilities to make spontaneous and unstructured conversations more tenable than traditional meeting solutions. They do this in one or both of the following ways: (a) by creating persistent, video-enabled, virtual rooms or channels. Entering a channel is analogous to opening your office door, inviting colleagues to drop in throughout the day; or (b) by introducing spatial video capabilities, where users can only hear/see those in close proximity to them within the app. Users are represented as an icon or avatar and can either click on colleagues to join them or can roam a 2D virtual space. All VCSs provide rich presence features and visually show the meetings taking place within a team or group, raising transparency.

- Most of the technological hurdles have been solved by the conferencing and meeting solutions that preceded today's VCS vendors.

- A VCS can greatly benefit teams or groups whose activities require frequent contact or are conversationally driven.

- Even hybrid teams with infrequent conversation needs may find a VCS necessary to bridge the gap created by moving work out of the office.

- VCSs are not immersive (virtual reality) technology; however, many VCS apps have rebranded as 2D metaverse applications amid the surrounding hype.

Obstacles

- Most IT organizations prefer to minimize the number of collaboration tools they support. The value a VCS can bring has had difficulty resonating with enterprise IT buyers as VCSs are unlikely to replace traditional video conferencing tools. Gartner clients report purchasing decisions are primarily led by line-of-business leaders or adopted by teams in a grassroots fashion.

- The use of VCSs is still very new. Cultural and work style changes will be required for successful adoption of a VCS at most organizations. This means that strong messaging and example setting from leadership/team managers will be needed. Customers and VCS vendors will evolve together. In a market this new, a customer with heavy usage can influence the product roadmap.

- VCSs are built around real-time video capabilities. VCSs do not work well for teams spread across time zones that are more than four or five hours apart.

- Due to the emerging nature of this market, privacy, security and compliance concerns persist.

User Recommendations

- Evaluate VCSs as a means for achieving collaboration equity, engagement and increasing visibility of remote workers by first piloting them as social gathering spaces.

- Align your organization's use cases for VCS with the most appropriate vendor(s) by assessing each vendor's strengths and weaknesses. Some VCS vendors specialize in internal, team collaboration, while others specialize in education or social gatherings.

- Don't become locked into an individual VCS vendor early as this is an emerging market. Be prepared to switch vendors as the market evolves. Gartner has seen vendors enter and exit the market (through acquisition or insolvency), and expects to see more churn over the next few years. Additionally, a number of established vendors (such as Zoom and RingCentral) are adding VCS capabilities to their product suites.

- Avoid unnecessary purchases by evaluating alternatives. Community and peer networking tools, and workstream collaboration apps may overlap with VCS for some use cases.

Sample Vendors

Bramble; Gather; RingCentral (Team Huddle); Sococo; SpatialChat; Topia; Welo; Zoom (Huddles)

Gartner Recommended Reading

Market Guide for Meeting Solutions

Digital Workplace Applications Primer for 2023

At the Peak

Collaboration Equity

Analysis By: Christopher Trueman

Benefit Rating: Moderate

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Collaboration equity (CE) is a discipline that relies on a set of work practices, etiquettes and technologies to ensure workers can fully participate in team activities and influence business outcomes, regardless of their environment. CE fits within a broader employee experience strategy, supporting both evolving flexible work initiatives and organizational values for employee engagement, productivity and innovation.

Why This Is Important

Flexible working arrangements and multilocation organizations require CE initiatives to ensure that all employees have equal opportunity to participate fully in team activities. This requires employees to have equitable access to corporate resources, decision makers and peers — and the agency to act to improve their standing in the organization and create value for the business.

Business Impact

Achieving CE strengthens organizational cohesiveness by:

- Creating richer employee engagement for all, irrespective of work location, role or task.

- Meeting employees' expectations for inclusivity and for access to resources and each other.

- Ensuring all employees deliver full value in their roles and assigned projects.

- Boosting productivity and innovation through intentional collaboration.

- Facilitating employee relationships by establishing and nurturing ties both strong and weak.

Drivers

Organizations with flexible work policies require proactive implementation of best practices and technologies relating to CE in order to deliver an exceptional digital employee experience by:

- Supporting flexible work at scale. This requires you to build a cohesive team to maintain productivity and create innovation in support of business goals.

- Reducing remote employees' fear of missing out on decisions and actions relevant to their roles.

- Providing team leaders with greater visibility into how their teams are performing across locations, using, for example, agile disciplines, objectives and key results (OKRs), and collaborative work management tools.

- Fostering team unity by creating the trusting relationships that come with an open, equitable environment.

- Retaining and recruiting valuable employees. This involves highlighting how both in-person and remote employees have equal opportunities to influence decisions and actions. Team members do not generally look for preferential treatment, but everyone wants to be treated fairly.

- Setting the stage for collaboration strategists to focus CE practices on improving team dynamics and delivering business value.

- Demonstrating deep commitment to flexible work policies and the workers who take advantage of them. This encourages workers to use all the options available to them, and confers additional agency and agility in terms of how they work. In time, this can create a positive feedback loop.

- Supporting hybrid meetings. These will be a reality for many organizations, though Gartner's 2022 Digital Worker Survey found that workers want to spend only 18% of their time in these meetings and view them as significantly less productive than in-person and virtual meetings using audio and video.

Obstacles

- A corporate culture built on traditional team structures might be insensitive to the need for CE, beyond tactical technology implementations.

- Employees in office locations might not have equal respect for those who choose to work elsewhere.

- When under duress, managers might turn for help to employees who are in the same office, rather than consider remote employees, even if they would be a better choice.

- An organization might lack a digital workplace program mature enough to allow for the level of cooperation between IT and non-IT stakeholders necessary to achieve all of a CE program's goals.

- Investment in technology may be needed to equip all employees and conference rooms with the necessary tools to enable successful collaboration with peers, partners and customers.

User Recommendations

- Test ideas that will help your organization get closer to the ideal of CE before making significant new investments. CE is more of an aspirational strategy than a well-defined set of implementations.

- Be agile rather than prescriptive when making changes. Achieving CE requires an evolving strategy that includes incremental modifications and validation through analysis of employee sentiment.

- Improve meeting etiquette and the layout of meeting rooms, as this can help remote meeting participants who may struggle to influence discussions held in conference rooms. This also helps prepare an organization for more CE initiatives.

- Plan for procedural, behavioral and cultural changes. Technological changes may improve CE, but they are unlikely to deliver it fully on their own.

- Set and assess OKRs to ensure work assignments and opportunities are assigned to employees equitably and based on merit.

Internal Talent Marketplaces

Analysis By: Emi Chiba

Benefit Rating: Transformational

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Internal talent marketplaces (ITMs) are intelligent platforms that match internal or contingent workers to work opportunities without recruiter involvement. They provide personalized recommendations aligned to workers' unique skills and experiences. Opportunities include gigs, time-boxed projects, stretch assignments, mentoring or full-time roles. ITMs offer marketing features, matching algorithms and feedback functionality, while aligning with adaptive organizational design principles.

Why This Is Important

Continued market uncertainty and demand for new skills have made adaptability and resilience critical. Volatility combined with worker demands for increased mobility and development opportunities has led to the adoption of ITMs. ITMs provide organizations with valuable insight into skills and workers equitable insight into available growth opportunities. They are key to enabling adaptability, resilience and experiential learning.

Business Impact

Adopters of ITMs use them to:

- Understand workforces through a different lens — focused on the skills needed, rather than the role.

- Gather skills data and support talent through experiential learning and hands-on opportunities.

- Encourage and track employee development and collaboration in new ways, with a focus on skills.

- Address rapidly changing business priorities, and redeploy or reskill existing employees in order to improve organizational sustainability, while increasing employer brand appeal.

Drivers

- **Business agility and composability:** Agile and composable organizations require more flexible deployment of workers across projects, products and other initiatives. Composable businesses are architected for real-time adaptability and resilience in the face of uncertainty. They need people with learning agility to adapt to changing skills demands. They also need to be able to align a highly networked workforce to the work that needs to get done in a dynamic way.

- **Talent visibility:** HR and other organizational leaders benefit from the data and insights from ITMs to support workforce planning and other talent processes. Team, project and product leaders within organizations benefit from more flexible staffing and improved visibility into talent.

- **Worker demand for growth opportunities**: Deployed correctly, ITMs provide employees and contingent workers with better visibility into work opportunities. They can stretch and build up their skills and experiences in order to grow their portfolio of work and careers.

- **Technology availability:** Hype around the ITM has increased. The market for these platforms consists of human capital management (HCM) suite providers, talent acquisition vendors, learning platforms and specialist point solutions. Maturity in applying AI to detect, infer and map relationships between skills has increased, as has the use of AI techniques to automatically match talent to work opportunities.

Obstacles

Organizational challenges impeding adoption include:

- Lack of cultural readiness for more dynamic and adaptive organizational models and project- or gig-based work.

- Talent hoarding due to fear of lack of resources. Managers may discourage team members from seeking outside opportunities as they only see talent engaging in work for other teams, and fear not having enough talent to get assigned work done on their own team.

- Lack of psychological safety. Workers may not be confident enough to bid on projects or gigs for fear that they will not be selected. Uncertainty can also exist around how performance on projects will impact annual performance reviews.

Data-related challenges include:

- Access to data regarding worker and worker experiences, knowledge and skills.

- Use of organization-specific and more granular skills to enable better matching.

- Difficulties in balancing privacy and the need for a significant amount of talent data to enable better user experiences through more relevant matching.

User Recommendations

- Pilot ITMs within business units that use adaptive or agile organization models, or work with progressive talent management leaders who want to deliver agile skills development.

- Invest in design thinking, work design and workplace ethnography. Allowing workers to bid for projects and gigs, represents a significant change to management practices.

- Inventory current skills ecosystem and data sources to decide what may feed into matches and recommendations in the ITM prior to vendor evaluation.

- Evaluate vendors by assessing user experience, ability to incorporate diverse sources of data and skills ontologies. When evaluating vendors with similar capabilities, prioritize user experience as user adoption is critical to the adoption and success of an ITM.

- Market the ITM, as it gets adopted within your organization, as an essential, growth-focused part of your differentiated employer brand.

Sample Vendors

365Talents; Degreed; Eightfold AI; Fuel50; Gloat; Oracle; ProFinda; SAP; Workday

Gartner Recommended Reading

Market Guide for (Internal) Talent Marketplaces

Innovation Insight for AI-Enabled Skills Management

Market Guide for Talent Acquisition (Recruiting) Technologies

Future of Work Reinvented: Shifting Talent and Skills

Radical Flexibility/Flexible Work

Analysis By: Emily Rose McRae, Graham Waller

Benefit Rating: Transformational

Market Penetration: 5% to 20% of target audience

Maturity: Emerging

Definition:

Flexibility should extend beyond just "where" and "when" employees work. Radical flexibility — providing workers with the ability to decide how much they work, whom they work with and what they work on — not only increases employee satisfaction with an organization's employment value proposition. It also increases the percentage of high performers in teams by 40%.

Why This Is Important

Human-centric work designs with flexible experiences including elements of employee autonomy in work arrangement and work scheduling have a statistically significant positive impact. This results in higher employee-reported productivity, higher intent to stay, higher performance and reduced fatigue over nonflexible experiences.

Business Impact

Most organizations are interested in radical flexibility for its attraction and retention impact. However, when organizations deliver radical flexibility — compared with delivering flexibility only in when and where employees work — the percentage of employees who are defined as high performers increases by 40%.

Drivers

- **Talent shortage:** Difficulty retaining and attracting talent, particularly talent with scarce skills, has driven more and more organizations to consider increasing their flexibility offerings, especially if they are unable to compete on compensation.

- **Greater demand for autonomy:** Most organizations offer some level of flexibility in when and where employees work. But employees seek more autonomy across multiple dimensions of their work. To give employees the level of autonomy they expect today, organizations should offer radical flexibility, including with whom, on what and how much they work. When implemented well, radical flexibility is not a free for all. Instead, it is first grounded in holding employees accountable for their results and then granting them appropriate autonomy on how they achieve those results. We call this *accountable autonomy*.

- **Untapped productivity:** A huge pool of untapped productivity is hiding in plain sight in organizational work design. The 2023 Gartner Future of Work Reinvented survey found that employees who experience a human-centric work design, which combines three elements — flexible experiences, human-centric management and intentional collaboration — are 3.8 times more likely to report high productivity than those without human-centric work attributes. The 2022 Gartner Digital Worker Survey found that 71% of workers who work from a combination of locations reported higher productivity over the last 12 months, 25% higher than those who work mostly in an office or at home.

Obstacles

- **Productivity risk:** When providing radical flexibility, leaders find it challenging to ensure productivity while providing choice in flexible work options. The best organizations provide flexibility within team-established boundaries, focus on the activities of the role rather than the role itself, and identify and socialize manager-tested productivity solutions.

- **Collaboration:** Leaders find it challenging to set expectations and team norms around how to be productive in a flexible environment when employees' schedules, personal needs and home environments differ.

- **Assumptions about feasibility:** Regardless of role and industry, both frontline and location-agnostic workers want proportionally similar rates of flexibility. Focusing only on flexibility in where and when work happens means that some roles, especially frontline worker segments, are considered out of scope for flexibility.

User Recommendations

- Embrace radical flexibility as part of a human-centric work design grounded in a principle of accountable autonomy that harmonizes employees and teams desire for flexibility with the enterprises need for productivity and delivering results.

- Make all dimensions of flexibility more inclusive — even the "when" and "where" — by focusing on the activities of a role, rather than the role itself. While most organizations provide flexibility opportunities based on employees' roles, focusing on the role's activities instead can reveal hidden opportunities for flexibility in all roles, even those commonly considered ineligible.

- Improve team alignment and collaboration in a flexible environment by giving employees choices about where and when they work within team-established boundaries of how much they work.

- Scale flexible work practices by providing a virtual space for all managers of remote teams to share best practices and learn from one another.

Sample Vendors

Gigged.Ai; Jitjatjo; Roleshare; WorkEQ

Gartner Recommended Reading

How Organizations Are Taking Action to Increase Frontline Flexibility

CIOs Need to Embrace Radical Flexibility to Drive the Post-COVID-19 Work Experience

Survey Analysis: Which Hybrid Work Models Boost Productivity and Other Talent Outcomes?

What Workers Want: Top 10 Insights From the Digital Worker Experience Survey

Visual Collaboration Applications

Analysis By: Brent Stewart

Benefit Rating: High

Market Penetration: More than 50% of target audience

Maturity: Mature mainstream

Definition:

Visual collaboration applications are cloud-based tools that enable teams to communicate and creatively collaborate during both asynchronous and real-time work. They provide a shared digital canvas offering collaboration features and templates for common frameworks, flows, activities and designs.

Why This Is Important

During the pandemic, visual collaboration applications became an essential part of the digital product team's toolset, and have only grown in popularity and impact as organizations return to the office or engage in hybrid work models. The most significant insights, ideas, strategies and designs for leading digital products emerge on the whiteboard of a visual collaboration app. As such, they are seen by many as the place where "the magic happens" for design, product and engineering teams.

Business Impact

Visual collaboration applications make remote and hybrid creative work possible. Without them, the only other viable approach is colocated, workshop-style collaboration that used to be standard practice for digital product teams. In fact, Gartner hypothesizes visual collaboration apps elevate creativity and productivity, regardless of whether they are used remotely or in person, due to the templates they provide, team participation they promote and traceability they enable.

Drivers

- Permanence of remote and hybrid work: The global shift to remote and hybrid work makes visual collaboration applications the "new whiteboard" and a required platform for any digital product or business strategy team, whether used in person or remotely.

- Product team collaboration: Coordinating handovers between product management, design and development can take significant effort, and a misaligned product team results in misaligned products. Visual collaboration apps reduce, and even eliminate, handovers between stakeholders and contribute to the delivery of more cohesive products.

- Design thinking and collaborative creativity: The rise of design thinking and collaborative creativity, in the form of workshops, design sprints, strategy sessions and more, requires a workspace that enables shared ideation, evaluation and decision making.

- Templates: Visual collaboration tools include templates for brand, business, marketing and product strategy methods and techniques that accelerate discovery, exploration and validation of insights, ideas, strategies and designs.

- Integrations: Recent feature enhancements from vendors include integrations with popular product management, user experience (UX) design and software engineering tools.

- Generative AI: With AI completing increasingly more production work, such as screen designs, user flows, and code, the role of the human will shift strongly towards research and strategy activities. Visual collaboration tools will become the single-most important "home" for human creativity in the enterprise.

Obstacles

- Customer perception as a remote-only tool: Many view visual collaboration applications as a solution for remote or hybrid teams only. As organizations transition from fully remote work to in-office or hybrid arrangements, it is possible purpose-built visual collaboration applications (e.g., Miro, Mural, Klaxoon, etc.) will be viewed as expendable by some teams.

- Competition from design and business communication platforms: Collaboration and co-design features (such as a digital whiteboard) in design platforms (e.g., Figma [FigJam]) and business communication platforms (e.g., Microsoft Teams, Zoom Video Communications, etc.) are close to — or on par with — purpose-built visual collaboration tools.

User Recommendations

- Build a platform evaluation and selection process, by ensuring that the needs of all product stakeholders are considered when choosing a visual collaboration application.

- Employ a visual collaboration application as the de facto means for sharing product and design knowledge with development. Plan and execute workshops and design sprints on the selected platform, whether working remotely or in person.

- Use a visual collaboration application to plan and execute user research activities that require real-time, one-on-one facilitation.

Sample Vendors

Bluescape; Figma; InVision; Klaxoon; Lucid; Miro; Mural

Appointment Scheduling Software

Analysis By: Sohail Majumdar, Adam Preset, Tori Paulman

Benefit Rating: Moderate

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Appointment scheduling software are applications that simplify the scheduling process by matching calendars, automating coordination and setting up appointments among internal and external participants. Apart from core features, such as meeting coordination and scheduling, differentiating capabilities typically include notifications, platform integrations, event management capabilities and dashboards for meeting insights.

Why This Is Important

The new ways of working have increased the number and complexity of meetings. Hybrid work's ubiquity has resulted in meeting attendees joining meetings via multiple platforms, devices, locations and time zones. This complexity of meetings coupled with the expectation to provide attendees with an optimal premeeting experience has warranted the implementation of appointment scheduling to reduce back and forth, automate coordination and mitigate no-shows while improving end-user experience.

Business Impact

Adopt the right appointment scheduling software to:

- Reduce back and forth by providing employees the ability to make their available slot visible, reducing manual coordination.

- Save time by informing businesses about time needed for certain types of appointments to avoid overbooking.

- Reduce no-shows via automated email and SMS reminders.

- Improve customer, interviewee, client impact by providing a seamless pre meeting experience via a comprehensive, easy-to-understand and quick-booking page interface.

Drivers

- Appointment scheduling technology is used as a gatekeeper/proxy to cover internal and external attendees for a meeting (e.g., scheduling sales calls, citizen services and patient care).

- The increase in meetings, especially hybrid meetings, is necessitating digital workplace application leaders to address pain points around coordination.

- Vendors specializing in appointment scheduling often solve for industry or experience-specific examples and have developed differentiated features to support key use cases, such as CRM capabilities, automated workflows, Health Insurance Portability and Accountability Act [U.S.]/Department of Health/General Data Protection Regulation (HIPAA/DOH/GDPR) compliance certifications, complex dashboards for meeting behavior insights, resource scheduling, etc.

- Appointment scheduling vendors are differentiating by integrating appointment scheduling with workplace experience aspects like resource scheduling, queue management, wayfinding, visitor management, etc.

Obstacles

- Market maturity in internal meetings: The internal meeting use case has been ingrained in employees' behavior unless application leaders want additional features like meeting behavior insights that could help them optimize their real estate portfolio by merging the data with space usage metrics.

- Time and energy spent onboarding an additional tool: IT does not want to worry about a new tool for meetings as it makes training and supports cumbersome unless there is a solid proof of concept aligned with a specific use case that a new tool solves.

- Potential disruption in the market by existing enterprise suites: The appointment scheduling market can see mergers and acquisitions, and product development across existing players and enterprise suites increasing the risk of getting stuck with a redundant product having signed a long-term contract.

User Recommendations

- Shortlist vendors by matching capabilities (good interface, meeting insights, resource scheduler, queue management, etc.) with employee experience aspects that your organizations must solve. E.g., automated reminders for reducing no-shows, dashboards for meeting insights, automated workflows for simplifying coordination, compliance certifications for added layers of data security, etc.

- Use existing suite offerings to solve coordination use cases using existing features and/or API integrations. For complex industry-specific and/or business-critical use cases, choose third-party specialist appointment scheduling vendors.

- Improve the visitor experience and user acceptance by paying special attention to appointment scheduling software that either has in-built features or can integrate with existing systems to provide workplace experience functionalities like resource scheduling, queue management, wayfinding capability, navigation, etc.

Sample Vendors

Acuity Scheduling; Bookafy; Calendly; Chili Piper; GoodTime; Microsoft; Sign In Solutions; SimplyMeet.me; TIMIFY

Gartner Recommended Reading

Redesigning Work for the Hybrid World: Opportunities for Knowledge Workers

Build Better Meeting Rooms to Support Hybrid Work

Video-Enable Meeting Rooms for Collaboration Equity in Hybrid Workplaces

Market Guide for Workplace Experience Applications

Employee Communications Applications

Analysis By: Mike Gotta

Benefit Rating: High

Market Penetration: 20% to 50% of target audience

Maturity: Adolescent

Definition:

Employee communications applications (ECAs) enable organizations to manage the planning, creation, personalization, delivery and analysis of internal communications (IC). These technologies also encourage feedback via polls, surveys, chat and comments. ECA solutions contribute to a broad strategy to improve employee experience and engagement, including for frontline workers.

Why This Is Important

Effective IC affects employee experience in a variety of ways. When done well, employees are more aware of what's going on in terms of strategic and operational activities, and gain a better understanding of what's being asked of them and how they add value. ECA technology underpins these efforts, providing communicators with governance over how communications are created, distributed and experienced. ECA enables employees feedback to management and analytics for ECA sponsors to assess value.

Business Impact

ECA helps organizations reach their entire workforce, including highly mobile workers or those with limited digital interfaces. ECA tools provide communicators (those in formal roles and responsible for certain types of messaging) the means to plan, manage and analyze communication efforts. Employee value of ECA is based on personalized, relevant and contextual communications, along with the opportunity to provide feedback and gain access to key applications (e.g., payroll, benefits and shifts).

Drivers

■ ECAs are deployed to address employee experience and engagement needs. They are part of a collection of digital workplace applications that build connectedness and organizational alignment.

■ Leadership teams have recognized the need for more effective frontline worker communications to address productivity and retention needs. Technology enablement for frontline workers is driving the use of workforce superapps.

■ Dissatisfaction with email and legacy intranets is encouraging exploration of modern ECA tools designed for multichannel and multidevice experiences (including digital signage).

■ ECA capabilities are broadly available, making them easy to procure but at some risk. Vendors have different levels of completeness and buyers have varying levels of maturity when defining needs. With major vendors (such as Microsoft) in the space, IT organizations are taking a greater role in the evaluation and selection process.

■ ECA is expanding to include guided experiences that nudge employees to opportunities where they participate in programs related to ERGs, well-being and career matters. Expansion into communities and live events is progressing.

■ Interest in generative AI and ChatGPT are encouraging ECA vendors to innovate either by helping in the creation phase of internal communications, or in ways that affect the employee experience by making it easier to navigate and consume the most relevant information needed.

■ ECA tools are often used by IC teams working with HR, executives and internal marketing groups. However, for frontline workers, decisions are often driven by operational leaders in cooperation with IC groups. The divergence in frontline and office workers in terms of requirements and digital employee experience needs can lead to multiple solutions.

■ ECA analytics creates workforce insights that appeal to other stakeholders, such as those involved in talent, voice of the employee or operational improvements.

Obstacles

- Business value from ECA is hard to prove. Measurements may not have enough "hard data" to satisfy sponsors who may be reluctant to rely on qualitative data combined with tool usage reports.

- Diversity of ECA vendor offerings makes it critical to establish selection criteria related to personas, editorial and campaign management, channels, integrations and analytics. The effort requires collaboration across multiple stakeholders including IT.

- Emergence of generative AI/ChatGPT in ECA will focus on communicators first, a small audience. Until vendors extend AI-enablement to employee experiences, higher-value impacts will take time.

- The ECA market is in transition. Capabilities are common in intranet packaged solution providers and mega-suite vendors such as Microsoft and ServiceNow. ECA for frontline workers are evolving into frontline superapps and work hubs. Such dynamics creates tension between short- and long-term decisions. Conservative firms may wait until the market settles down.

User Recommendations

- Take a programmatic approach by identifying use cases, worker segments, channels, content types, goals, integrations, access and analytics, by working with stakeholders focused on employee experience, engagement and frontline workers.

- Augment ECA vendor selection criteria by including subjective qualities, such as usability, digital employee experience and options to capture staff feedback.

- Ensure ECA analytics are well-defined, as measuring communications effectiveness is key to identifying business value.

- Ensure operational readiness by taking advantage of vendor options like strategy, proof of concept (POC), administrative training. Execute pilots to assess impact and expand use. Address governance by defining content and administration frameworks to ensure consistency and quality.

- Connect efforts and engage stakeholders to select and deploy ECA technology by involving those in related areas, such as digital workplace, intranets, frontline workers and business continuity.

Sample Vendors

Beekeeper; Firstup; LumApps; Microsoft; Poppulo; Staffbase; Unily; Workvivo; YOOBIC; Zipline

Gartner Recommended Reading

Modernize Employee Communications to Improve Digital Experiences and Workforce Engagement

Market Guide for Employee Communications Applications

Tool: Employee Communications Applications Vendor and Product Data

Market Guide for Intranet Packaged Solutions

DEX Tools

Analysis By: Dan Wilson, Autumn Stanish, Stuart Downes, Tom Cipolla

Benefit Rating: High

Market Penetration: 20% to 50% of target audience

Maturity: Early mainstream

Definition:

Digital employee experience (DEX) tools help IT leaders measure and continuously improve the performance and employee sentiment toward company-provided technology. Near-real-time processing of aggregated data from endpoints, applications, employee sentiment and organizational context surfaces actionable insights and drives self-healing automation, optimized support and employee engagement. Insights and self-healing can also enhance IT support.

Why This Is Important

Accelerated digital workplace investment has highlighted gaps in objective measurement and continuous improvement of DEX. Client interest in DEX has steadily increased since the start of 2021. Primary use cases focus on tactical and technology issues however mature digital workplaces are expanding to include more strategic use cases. Their cross-functional DEX strategy directly targets reduced IT overhead and improved DEX as a way to retain and attract top talent.

Business Impact

DEX tools shift focus from technology management to more business value-added work. Specific impacts include:

- Fewer IT issues that disrupt and impede employee productivity.

- Reduced IT overhead through automation.

- Improved endpoint configuration and patch compliance.

- Better balance of objective and subjective success measures, including technology adoption, performance and employee sentiment.

- IT becoming more proactive and human-centric.

- Increased ability to retain talent.

Drivers

- DEX is a major influencer of the overall employee experience.

- Organizations are increasingly dependent on technology to perform their work.

- Employees are suffering in silence by living with or working around issues rather than reporting issues to IT.

- IT leaders seek broader measurement and management capabilities as internally focused activity KPIs have proven incomplete.

- IT administrators are looking for better visibility into how hybrid workers' devices are performing.

- Employee sentiment toward technology cannot be measured effectively with periodic or transactional surveys alone. Feedback must also include how employees feel about and engage with specific devices or apps, and how technology changes impact their work.

- Service desk and other IT support analysts require faster access to device configuration and performance data to offset an increase in support interaction volumes and wait times.

- Increasing threat of cyberattacks demands faster identification and remediation of configuration issues and missing patches.

- Increased focus on sustainable IT is promoting consumption- and performance-based device life cycles in place of refreshing devices on a schedule.

- AI and machine learning have significantly increased the value and capability of SaaS-based DEX tools.

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Obstacles

- Legacy culture that does not trust the tool's insights or sees automation as a threat.

- SaaS- or cloud-averse organizations will be limited to less capable on-premises offerings.

- Low-maturity IT support or end-user computing (EUC) organizations may not be ready for DEX tools.

- An "ignorance is bliss" mindset fearing that a sudden unveiling of the massive volume issues will make IT leadership look bad.

- The cost to acquire, implement and integrate new tools.

- Insufficient staffing levels or skills required to operate a DEX tool.

- Failure to adjust IT staff rewards and recognition to promote new behaviors and DEX tool adoption.

- The need to account for legislative, regulatory, industry or labor union limits on data collection and use.

- The lack of maturity and feature parity among representative and similar tools including common APIs for integration.

- Smaller organizations have limited options given that many DEX tools target larger enterprises.

User Recommendations

In its third year on the Hype Cycle, DEX tools have reached the Peak of Inflated Expectations. Market penetration and maturity have also advanced. Organizations that have not invested in DEX tools should:

- Build a broader team by collaborating with business and IT peers to define IT and non-IT use cases.

- Ensure the business case focuses on objective and measurable impacts by minimizing reliance on vendor-provided ROI templates.

- Choose a DEX tool that best fits your needs and budget by using the Market Guide for DEX Tools.

- Assign dedicated ownership and allocate dedicated resources to deploy and drive DEX tool adoption and ROI. Resources can be reallocated from IT support roles as proactive automation reduces support volumes.

- Incentivize new behaviors by adapting IT performance measures to focus more on outcomes than activities.

- Avoid diminishing returns by adding features and use cases as the team and DEX tool matures.

Sample Vendors

1E; ControlUp Technologies; HP Inc.; Ivanti; Lakeside Software; Nanoheal; Nexthink; Riverbed Technology; Tanium; VMware

Gartner Recommended Reading

How to Successfully Deploy a DEX Tool

Market Guide for DEX Tools

Employee Enablement Is Key to Digital Workplace Services Leaders' Survival

Everyday AI

Analysis By: Adam Preset

Benefit Rating: Transformational

Market Penetration: 1% to 5% of target audience

Maturity: Emerging

Definition:

Everyday AI refers to snippets of AI services that help workers improve productivity, deliver higher-quality work and save time. Workers interact with everyday AI mostly as features of widely used personal and team productivity applications that are typically deployed across an organization horizontally. These AI services are used by employees throughout the day, and will become increasingly varied and integrated into our working lives.

Why This Is Important

Everyday AI technology aims to help employees deliver work with speed, comprehensiveness and confidence. Recent advances in generative AI promise to streamline content creation, analysis and collaboration. Machine learning and natural language processing capabilities are becoming more common and embedded in application features to enable automation and efficiency. Everyday AI supports a new way of working where intelligent software is acting as more of a collaborator than a tool.

Business Impact

Everyday AI can amplify the productivity of any worker. As digital work becomes more complex, workers are expected to master more capable yet complex applications. Everyday AI can simplify some of that complexity. Employees who wield everyday AI can focus on meaningful, high-value, creative output rather than the routine tasks that can be delegated away. Deployment of technology to meet this need is more scalable and efficient than hiring and training additional talent.

Drivers

Vendors in different technology markets seek to improve worker productivity in novel ways beyond simple application and feature enhancements. The development of everyday AI capabilities delivers these productivity benefits while also providing vendors with a marketable and monetizable set of new capabilities. Gartner expects to see continuing innovation from vendors as they expand their everyday AI features, with collaboration megavendors making the most aggressive investments and prominent announcements.

Several enterprise application markets have AI assist capability that aids workers in various ways. Following are examples of categories and functions that employ everyday AI:

- Business productivity: correcting errors, improving message clarity, coordinating meetings.

- Content creation: composing entire documents or designing presentations based on modest prompts.

- Workstream collaboration: notifications, canned responses, task execution.

- Meeting solutions: transcription, translation, highlighting and identifying action items, meeting scheduling.

- Search: aggregating, summarizing and citing information following natural language prompts.

- HR applications: streamlining access to organizational and employee information.

- Performance management: aggregating metrics data, providing coaching guidance.

Workers generally embrace everyday AI as it helps them save time while reducing drudgery and stress. Organizations will invest further in everyday AI as they see the technology is able to multiply their workers' output and effort. Everyday AI will become increasingly sophisticated, moving from a service that, for example, can sort and summarize chats and email messages, to services that can write a report with minimal guidance. In many ways, everyday AI is the future of workforce productivity.

Obstacles

- Employees are unaware of everyday AI features. They distrust everyday AI, are concerned about privacy and may resist use due to poor early experiences with it.

- Some routine work processes may not be suitable for everyday AI. Enterprises may need to create foundational governance policies and practice guidance to enable the use of everyday AI. New everyday AI tools backed by generative AI demand more cloud computing resources, so sustainability and environmental impact may limit comfort with the technology.

- The benefits of successful use may be hard to capture or attribute to everyday AI capabilities. Everyday AI may require an explicit request for service, rather than being integrated into how people work where contextual disclosure can be applied.

- Vendors may overrepresent the capabilities of everyday AI. They may create and charge for product models where varying levels of everyday AI features are available at different tiers, which can make broad adoption confusing or expensive.

User Recommendations

- Ensure that employees are aware of everyday AI capabilities in the tools they use. Find out why employees may be hesitant to use everyday AI features and methodically address objections, particularly around privacy.

- Maintain a running inventory of everyday AI features and create an everyday AI digital side hustle. Retain healthy skepticism when vendors claim to have advanced everyday AI capabilities.

- Track new everyday AI usage patterns to inform enablement strategies. Make everyday AI a top software evaluation criterion.

- Be increasingly bold in the approach to everyday AI; look for applications where the use of everyday AI can have an increasingly larger impact, such as in common activities such as creating written and visual content, data analysis and improving meetings.

Sample Vendors

AmplifAI; Beautiful.ai; Calendly; Google; Grammarly; Microsoft

Gartner Recommended Reading

Predicts 2022: Digital Workplace Is Foundational for Employee Experience

Quick Answer: How Can Everyday AI Improve Worker Digital Dexterity?

Quick Answer: How Will AI in Microsoft 365 Copilot Impact the Workplace?

Superapps

Analysis By: Jason Wong

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Emerging

Definition:

A superapp is a mobile app that provides end users (e.g., customers, partners or employees) with a set of core features, as well as access to independently created miniapps. The superapp is an open platform to deliver a miniapps ecosystem. Users can choose miniapps from this ecosystem to activate for consistent and personalized app experiences. There is no separate app store or marketplace for miniapps; instead, superapp users discover, activate and deactivate miniapps in the superapp.

Why This Is Important

Users demand mobile-first experiences that are powerful and easy to use. Superapps have expanded outside China and South Asia to India (e.g., Tata Neu, MyJio and Paytm); Latin America (e.g., Rappi, PicPay, Mercado Libre); and the Middle East/Africa (e.g., M-PESA, Careem and Yassir). The superapp concept is rapidly expanding to employee-facing use cases, such as frontline workers, and employee communications and engagement, such as Walmart's me@Walmart and Wipro's MyWipro apps.

Business Impact

Organizations can create superapps to consolidate multiple mobile apps or related services that reduce user experience (UX) friction (such as context switching) and development effort. Superapps can achieve economies of scale and leverage the network effect of a larger user base and multiple providers. Superapps provide a more-engaging experience for their customers, partners or employees. They improve UX by enabling users to activate their own toolboxes of miniapps and services.

Drivers

- Superapps are gaining interest from forward-thinking organizations that embrace composable application and architecture strategies to power new digital business opportunities in their industries or adjacent markets.

- Superapps are growing beyond mobile apps for consumer use cases. Frontline and remote work trends are driving the evolution of employee communications apps into workforce superapps through the addition of plug-ins for HR, payroll, shift management and other miniapp functions.

- The superapp concept is expanding into enterprise software as a service (SaaS) applications and tools, such as workflow, collaboration and messaging platforms (e.g., Slack and Microsoft Teams, which already have a large number of add-on apps to their main applications). Superapps are starting to expand to support a wide range of modalities, including chatbots, Internet of Things (IoT) technologies and immersive experiences.

- To achieve agility and digital transformation, a superapp advances the concept of a composite application that aggregates services, features and functions into a single app. Multiple internal development teams and external partners can provide discrete services to users by building and deploying modular miniapps to the superapp. This development ecosystem also amplifies the superapp's value, by providing convenient access to a broader range of services in the app.

Obstacles

- There are numerous technical ways to build a superapp, but creating the business ecosystem can become a bigger challenge than technology implementation. A superapp serves as a platform for internally developed miniapps across the business and for third-party, externally developed miniapps. Business partners are needed to create an extended ecosystem for monetization by deploying miniapps to an established user base.

- Another obstacle is getting the UX design of a superapp right for the audience, and also having consistency of the miniapps published to the superapp. Different user personas prefer to interact differently with miniapps — for example, some prefer single, task-focused miniapps versus others preferring everything at their fingertips. Inconsistent UX patterns in a superapp could negatively affect adoption and retention.

- Data sharing could be complex, including simple user authentication, such as single sign-on (SSO), and tracking user preferences or app usage history.

User Recommendations

- Educate partners on the innovations and business value a superapp strategy can drive to improve or consolidate mobile apps.

- Ensure that there is a sound business model and organizational structure to support the distributed development ecosystem for miniapps.

- Secure executive sponsorship by preparing the partnership strategy and financial case for funding as a digital business initiative.

- Identify core features in your superapp (e.g., commerce, communications or collaboration) that will drive a critical mass of adopters and create interest on the part of developers to serve those users

- Offer an easy developer experience and convenient developer tools (e.g., APIs, design guidelines, software development kits [SDKs] and frameworks) for partners to build, test, register and submit miniapps for potential monetization.

- Define security and data protection needs by establishing governance reinforced with common platform implementation to satisfy security and data protection constraints.

Sample Vendors

Alipay; DingTalk GeneXus; Ionic; KOBIL; LINE; Microsoft; PayPay; Paytm; Slack; WeChat

Gartner Recommended Reading

Quick Answer: What Is a Superapp?

Quick Answer: How Does a Superapp Benefit the Digital Employee Experience?

How Banks Can Take On Super-Apps

Top Strategic Technology Trends for 2023: Superapps

HR Virtual Assistants

Analysis By: Ranadip Chandra, Helen Poitevin

Benefit Rating: Moderate

Market Penetration: 20% to 50% of target audience

Maturity: Adolescent

Definition:

HR virtual assistants (HRVAs) are software applications (either integrated with other HCM applications or natively provided) that work with human voice (or text) commands to assist employees in completing HR tasks or requests. They also automate communication with users via a smartphone, tablet, computer or specific device.

Why This Is Important

HRVAs provide employee access to information and completion of transactions via conversational queries. This results in enhanced productivity because of increased use of business-critical information. It also results in decreased friction for employees when engaging with HR. Hype around ChatGPT and, more broadly, generative AI, has increased interest in HRVAs as a way to provide an improved employee experience.

Business Impact

Virtual assistants (VAs) are becoming an important layer in many HCM functions — particularly gaining maturity in recruiting, HR service management, enrollment for benefits process, onboarding and HR functional insights (e.g., flight risk analysis).

VAs with domain specific capabilities (e.g., HR) can initiate communication with the workforce in response to event triggered conditions. This facilitates timely response to changing business conditions by removing the need for employees to initiate transactions thus improving the employee experience.

Drivers

- VAs continue to grow not just in HCM but across all business applications. Recently, use of GPT models in a web service chatbot captured the imagination of the end users on a global scale and is currently leading to widespread experimentation.

- HRVAs in the broader market are becoming increasingly sophisticated. Many conversational AI platforms can now initiate up to moderate complexity transactions in administrative HR and other modules in response to natural language user commands.

- All cloud HCM suites and extended ecosystem vendors are investing further in this capability. Many of these VAs can also be deployed as a wrapper or as the underlying model in a "bot within a bot" framework — thus opening up possibilities to coexist with different virtual assistants deployed in the organization.

- Tasks related to reporting and data analytics require employees to follow complex, step-by-step technical processes. VAs can reduce these processes to one single step. For example, a recruiter asking a VA: "How is my recruiting pipeline performing?" and receiving an immediate answer, rather than painstakingly analyzing multiple reports and coming to a conclusion.

- A growing number of VAs leverage RPA and no-code or low-code integrations to enable full processing of workflows through the VA interface. This provides more value than a more simple FAQ-focused chatbot.

Obstacles

- HRVAs lag the overall market in supporting advanced use cases such as speech-to-text or multimodal inputs such as graphics, tables and video and gaze. The benchmark set by consumer applications or ChatGPT would be difficult to match in near term.

- Hundreds of vendors are available in the chatbot and VA market landscape, including myriad smaller, niche vendors who often overstate the capabilities leaving users frustrated if the VA cannot understand the real intent behind the interaction.

- Successful deployment of VAs needs equal maturity in three parts — natural language query, business intelligence (BI) to join the command and ability to integrate with sometimes very dated systems with limited integration capabilities (payroll & time). Many solutions only have the first part and miss out augmented analytics and integration elements.

- Deploying multiple chatbot solutions and creating a unified user interface provides an opportunity to leverage domain specific VAs.

User Recommendations

- Decide whether a centralized platform-based approach (deploying a generalized conversational AI) or a HCM contextualized VA approach is suitable for your organization. A centralized platform-based approach provides consistency in chatbot implementation, operations and conversational management. HCM contextualized VAs will offer deeper understanding of HR processes.

- Determine the use cases (e.g., shift reminder, learning content suggestion) for VAs that will result in maximum benefit to employees.

- Leverage the opportunity to explore different technologies leading the transformation of next generational conversational AIs. Balance the hype of Generative AI with ethical choice models such as Responsible AI.

- Assess the solutions on their ability to self-train based on the historical records of employee transactions. Additionally, any solution's ability to resolve a query based on variations of phrases, misspellings and keywords of the same question should be a "litmus test" for its effectiveness.

Sample Vendors

Acuvate; Amelia; Espressive; Leena AI; Moveworks; Socrates.ai; The Bot Platform

Gartner Recommended Reading

Infographic: Artificial Intelligence Use-Case Prism for HCM Technology

Market Guide for Integrated HR Service Management Solutions

Making Sense of the Chatbot and Conversational AI Platform Market

Digitally Enabled DEI

Analysis By: John Kostoulas

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Digitally enabled diversity, equity and inclusion (DEI) includes a range of technology solutions to enhance DEI in organizations. These solutions aim at maximizing data-driven decision making and specific value drivers — such as transparency, accountability and efficiency — across people processes and daily work.

Why This Is Important

The prevalence of hybrid work and the global social justice movement have changed the strategies leaders must implement to successfully deliver on DEI priorities. Corporate leaders also face intense external pressure to meet DEI and environmental, social and governance (ESG) measures. Technology is a powerful means for positive DEI outcomes; however, the 2023 Gartner DEI Functional Benchmarking Survey shows that only 8% respondents will prioritize implementation of DEI technologies in the next 12-18 months.

Business Impact

According to the 2022 Gartner Future of Work Reinvented Implementation Survey, human-centric work — combining flexibility, collaboration and empathy — makes high employee performance and intent to stay more than three times more likely. Sustainable business that incorporates ESG factors into decision making is fast becoming an integral part of business strategy, affecting all organizational functions, with ESG factors embedded into decision making. DEI can be seen as the amplifier to deliver both human-centric work design and sustainable business.

Drivers

- The need to obtain a real-time, granular view of diversity in its many forms across the employee base to map to DEI strategy goals.

- The requirement for a continuous feedback loop with employees to understand how individuals perceive the state of inclusion and its embodiment in the organizational culture.

- The need to scale employee resource groups (ERGs) to cover multiple aspects of DEI and geographies (making them "glocal").

- The need to reduce bias across talent sourcing and selection activities through the use of artificial intelligence (AI).

- The need to increase the funnel of potential candidates through outreach in diverse talent pools.

- Enhanced demand for tailoring candidate experience to the needs of various aspects of diversity across candidates.

- The need to proactively address (or at least detect and fix) pay and workplace inequity.

- Development of inclusive leaders across all levels of the organization.

- The need to ensure that the digital workplace is accessible to people requiring accommodations for various types of disability (including loss of sight, hearing or motor skills).

- Enhancement of emotional proximity for those employees that have weak physical proximity due to their remote/hybrid nature of work.

- Empowerment to increase workforce digital dexterity for a diverse range of people with differing abilities.

Obstacles

- **Narrow DEI focus**: Organizations often concentrate on just a single aspect of diversity (gender or ethnicity) or on compliance needs as opposed to broader business impacts.

- **Technology as an afterthought**: A number of DEI programs compromise technology use by leveraging it at later stages instead of during early design; unconscious bias training is a typical example.

- **Disconnects between global and local sponsors/owners of DEI programs**: Conflicts in prioritization between the global team and local operations lead to local purchases that need consolidation at a later stage.

- **Lack of integration between technology tools:** Narrow vendor vision or insufficient ability to execute an integration roadmap can contribute to this problem.

- **Too much focus on the HR/DEI function as the primary user:** Technology purchases need to balance functionalities and user experience targeting the HR/DEI function with functionalities that are mostly performed by managers and employees.

User Recommendations

- Increase the scalability and effectiveness of DEI programs by establishing technologies as an integral part of initial design. Don't wait until these programs hit the scalability wall.

- Map out all potential owners of DEI programs. These include DEI leaders, HR leaders, operational leaders and especially the CEO.

- Align technologies not just to HR and DEI professionals but also to operational leaders, line managers and employees.

- Team up with local HR and operations leaders, too. Progressive organizations increasingly blend local variations in their DEI programs to fit local objectives and culture (i.e., make them "glocal").

- Familiarize DEI leaders with the benefits of available technologies. Very often, leaders have limited understanding of what is possible.

- Pursue opportunities for DEI technology consolidation and alignment to employee experience by continuously evaluating large HCM vendor offerings and integrating among HCM suites and dedicated DEI applications.

Sample Vendors

ADP; Learning Technologies Group (LTG); Oracle; SAP; SeekOut; Syndio; UKG; Visier; WeSpire; Workday

Gartner Recommended Reading

Innovation Insight for Digitally Enabled Diversity, Equity and Inclusion

2023 Diversity, Equity and Inclusion Functional Benchmarking Report

Sliding into the Trough

Influencer Network

Analysis By: Tom Cipolla

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Influencer networks (INs) are purpose-driven champion communities established to advise on topics defined by the network's sponsor. Influencer networks are a powerful change management and employee experience strategy. Influencers relate to their peers more personally, enabling them to coach and transfer knowledge on technologies and best practices. INs are used to introduce new technologies, drive employee adoption and provide vital feedback to IT. They can also be used for other initiatives.

Why This Is Important

Changing employee attitudes and behaviors is difficult. While 54% of the workforce are proficient with digital technology required for work purposes, nearly 25% of the workforce are novices or developing knowledge. Peer relationships are a more compelling mechanism to support change than internal communications and management direction. INs are powerful at championing new ways of working, driving early and/or sustained technology adoption, and overcoming objections and workforce inertia.

Business Impact

Business impact and value of INs can vary:

- Effective INs support talent needs through opportunities for personal growth, professional networking and career enhancement.

- Technology-centric INs advance digital transformation and digital dexterity goals as employees grow proficient.

- Business-centric INs can catalyze support for work progress that can benefit customers.

- Cultural-driven INs (that is, HR-sponsored employee resource groups) can improve how employees align with the organizational mission and values.

Drivers

- Most organizations recognize that change is difficult. Peer advocates and influencers that act as coaches, mentors and subject matter experts can provoke a turning point in the adoption of new tools, new ways of working or other activities.

- Participation in influencer networks can help with retaining talent, sharing expertise and community building. Senior staff who have reached a certain plateau may enjoy expanding their skills with new challenges as a network member. New hires may leap at the chance to help, learn and build their professional reputation.

- INs unify the spontaneous and unstructured conversations that workers have among themselves to help each other. INs offer formalized contacts in social roles to provide that assistance.

- INs create a dynamic, exchange-driven community between employees sharing knowledge or opportunity, which benefits the organization.

- INs offer organizations a way to seek out, highlight and reward individuals with soft skills — such as empathy and persuasion — as high performers.

- INs provide employees with an appetite for learning, the ability to connect techniques and technologies with use cases, and agility and resilience. Further, INs give employees an opportunity to differentiate themselves professionally.

- IN members provide invaluable feedback to sponsors and stakeholders. What otherwise might be considered gossip and folklore, can be represented as gaps in change effort. Such insight can lead to adjustments in whatever goal the IN has as its objective.

- INs are experiencing a revival, ignited by hybrid work and digital workplace efforts, as IT groups seek to improve digital employee experience and address digital dexterity needs.

Obstacles

- When companies need to find employees to support change management efforts, they often turn to the same talent pool: high performers and high-potential employees. However, these employees do not always have the necessary soft skills.

- Organizations unfamiliar with forms of community building and community management may be slow or reluctant to introduce the concept, since it will affect their traditional practices.

- Measuring impact is difficult in any type of community endeavor. Business units may not see obvious value from their staff's participation and may be reluctant to approve participation unless they can see a near-term outcome.

- INs require motivated, empowered and skilled members. Organizations may not be well-equipped to recruit and gain the necessary resources to make an influencer network a cultural reality.

- INs focused on personal needs — such as DE&I, well-being and mindfulness — may be met with employee resistance or apathy due to concerns over motivation and effectiveness.

User Recommendations

- Analyze purpose, scope and IN member requirements before approval and launch. INs are a type of community but the experience is fluid, focused on networking and exchange of insight or information.

- INs thrive best with a community manager who establishes roles, guidance, succession planning and practices.

- Seek informal, self-formed IN communities that are not yet recognized. They can provide evidence for a business case.

- Recruit, empower and evaluate influencers that have the ambition and ability to meet IN goals and ensure they have manager backing. Track participant efforts to assess the value to leadership.

- Start small and grow INs over time using an iterative process. Include a communications plan to ensure that INs are known and champions are easily identifiable.

- Establish a measurement framework to gauge IN effectiveness and success. Include feedback from champions into training, knowledge bases and resources.

- Social recognition and gamification tactics may help influencers succeed.

Gartner Recommended Reading

Workplace Experience Apps

Analysis By: Tori Paulman, Janel Everly, Sohail Majumdar

Benefit Rating: Transformational

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Workplace experience (WEX) apps support positive employee office experiences by simplifying visit planning, reserving shared and personal spaces, and identifying available amenities. They are used to explore and reserve workspaces, navigate the workplace, find colleagues, and plan the best days to attend the workplace. WEX apps enrich the hybrid work experience by integrating with digitalized physical objects, and utilizing enterprise social graphs and artificial intelligence (AI).

Why This Is Important

Delivering hybrid work at scale demands a balanced approach to space planning, a shift from location-centric to human-centric culture and investment in workplace technology. Efforts to inspire or direct employees to return on-site are driving dramatic adoption of workspace usage monitoring and real estate portfolio optimization technologies. Employee experience improvement is a priority so that employees make better use of, and feel satisfied with, their face-to-face time.

Business Impact

WEX apps should be adopted to improve:

- The working relationship between IT leaders, real estate and HR.

- Earning the commute by delivering experiences that motivate employees to visit the office. Sixty-five percent of corporate real estate leaders state that employee workplace experience is their no. 1 priority.

- Meaningful and intentional use of the office by providing capabilities that help employees and managers coordinate. Seventy-seven percent of workers want to be a part of planning how hybrid work is orchestrated.

Drivers

- Ninety-six percent of HR leaders say that their organizations have adopted or will adopt hybrid work. The diversity of approaches and challenges to implement hybrid have accelerated innovation, and mergers and acquisitions (M&As) in the workplace experience app markets.

- According to Gartner's 2022 Digital Worker Survey, 77% of digital workers want to have their hybrid work schedule planned with them.

- Improving the employee workplace experience is the No. 1 priority for 67% of corporate real estate leaders, who are working with the digital workplace team to optimize the hybrid experience.

- Seventy-five percent of corporate real estate leaders expect to use an app to manage shared seating, room scheduling and desk booking. Buyers now want holistic workplace experiences via intentional visit planning, wayfinding, and automating via virtual assistants.

- Employees want a hospitable experience at the office, control over their proximity to colleagues, information about the number of people in the office, and personalization of their environment (air quality, etc.).

- Artificial intelligence (AI) and machine learning (ML) are being used to automate employee interactions, and provide actionable insights to workplace leaders for rightsizing portfolios.

- WEX apps must integrate with "things" like smart badges, customizable environmental controls (HVAC), digital signage, furniture, lockers, mobile devices and wearables to improve employee experience. They assist employees to check into desks, call an elevator or adjust temperature/lighting.

- WEX apps deliver insights into the number of employees and visitors who plan to occupy the office and integrate those insights with location sensors to monitor real-time occupancy. These capabilities provide facility leaders with critical cost avoidance and sustainability levers to adjust lighting, HVAC and shared services personnel in underutilized spaces.

Obstacles

- It's hard to acquire a one-stop-shop product for all functional needs because the needs of the hybrid workplaces across industries, regions and business units are so diverse.

- Leaders responsible for vendor assessment and capability mapping must navigate a competitive market, in which a significant number of vendor acquisitions, rapid feature evolution, and new entrants have reduced differentiation.

- Cost can be a barrier to entry due to pricing models for SaaS licenses and implementation costs for WEX apps, which vary widely and are often not budgeted for.

- Employee privacy can present a challenge to the goals of WEX apps to support an open and collaborative hybrid WEX.

- Leaders in siloed IT or real estate teams may pursue an app strategy that is redundant or duplicative.

- WEX apps offer the most value when integrated with enterprise systems (e.g., IWMS, security, network and human capital management [HCM] tech) that can significantly increase cost and labor investment.

User Recommendations

In its second year on the Hype Cycle, WEX apps have begun their descent into the Trough of Disillusionment, due to market penetration and continued challenges in supporting hybrid work.

- Navigate the WEX market by ranking the application capabilities needed to support your hybrid workplace strategy.

- Focus digital workplace strategies toward smart workspace trends by understanding vendor acquisition plans and feature roadmaps, and align those strategies with your future of work strategy.

- Gain stakeholder buy-in and reduce duplication of effort by creating a working group of IT, real estate, business and HR leaders, and employee champions to assess WEX apps.

- Avoid overprioritizing core capabilities by focusing on emerging ones, such as the ability to support employee coordination and virtual assistants.

- Organizations invested in Microsoft 365 should integrate with Microsoft by identifying their needs like open API, bidirectional calendar integration, Microsoft Teams apps and the ability to use Microsoft Graph.

Sample Vendors

Appspace; eFM; Envoy; Eptura; FlamencoTech; NFS Technology; Robin Powered; ServiceNow; Smarten Spaces; Tango

Gartner Recommended Reading

Market Guide for Workplace Experience Applications

Tool: Vendor Selection for Workplace Experience Applications

Demand to Support Hybrid Employee Experience Is Driving a Transformation of the Workplace Markets

Digital Adoption Platforms

Analysis By: Melissa Hilbert

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

A digital adoption platform (DAP) overlays applications (e.g., CRM, HCM, ERP, legacy and external) with in-application guided learning, simulations, nudging and analytics to drive adoption and engagement. DAPs improve adoption and usage supporting organizations' digital transformation objectives. They provide consistent user experiences that help users complete work efficiently. A DAP also offers analytics driving actionable insights to improve experience and streamlines work, improving ROI.

Why This Is Important

DAPs improve user productivity and efficiency, reducing digital friction and increasing user engagement and employee retention. Key employee use cases appear in sales, HR, ERP and digital workplace, but this technology applies to all functional areas in an organization. For external use cases where your company sells software, consider embedding a DAP to improve customer experience and loyalty. Use cases include onboarding, technology adoption and use, change management and process efficiency.

Business Impact

DAPs provide high value for organizations looking to improve adoption of applications for employees and customer experience. The ROI of DAP can be measured by:

- Reducing employee onboarding and training costs

- Speeding new-hire time to productivity

- Eliminating change management related training

- Reducing support tickets

- Improving user engagement, proficiency and efficiency

- Minimal setup and low administrative overhead

- Usage analytics and insights enabling continuous improvement

- Improved CSAT scores

Drivers

Digital adoption platforms are relevant for any organization in any vertical. The most prominent application employee use cases to date include where sales force automation (SFA), HR, ERP, procurement or digital workplace solutions are used.

- The solutions in the market have evolved to include platform capabilities, such as the use of partner ecosystems.

- The need for cross-application guidance and analytics is critical to digital transformation and improved employee experience.

- DAPs also address the need for multiple device types such as mobile, desktop, hybrid, web and on-premises hosted applications.

- Additionally, they are relevant for organizations selling software where user adoption and usage are critical to customer value realization, renewals and expansion.

- DAPs drive actionable insights to improve the user experience and maximize ROI from application investments.

Organizations should seek this technology if they are facing the following challenges:

- There is poor adoption of existing applications or high churn or growth of employees.

- Tasks are complex within an application.

- Tasks are performed infrequently but have high organizational impact.

- Business processes are changing frequently and knowledge management is difficult.

- An application changes frequently.

- Customers' end users using your software have low engagement where adoption is closely correlated to renewal or growth.

Obstacles

- On-premises applications behind firewalls are more difficult for some vendors to connect to and will be more costly to deploy while also losing some analytics.

- Mobile application support is weak from many vendors; some do not offer it at all.

- Language translation for content varies greatly among vendors.

- Some vendors utilize a per-application (including varying pricing for application complexity) and per-user pricing model, which can increase costs when deploying at the functional or enterprise level.

- Some vendors do not support cross-application guidance and analytics.

- Governance and new DAP roles for guidance, content creation and maintenance are required, as well as a partnership between product, customer success and IT teams.

User Recommendations

- Create a plan by functional area to incorporate DAP by prioritizing high-impact applications such as CRM, ERP, HCM or client-facing applications across the entire tech stack or product portfolio.

- Evaluate all applications for an employee's work hub by documenting all applications used to get work done by an employee.

- Ensure analytics are deep at both a macro (aggregate) and a micro (workflow) level and can cross applications for a single workflow.

- Investigate multilanguage capabilities for application and content support.

- Design a governance plan by including new DAP roles or reallocation of learning and development (L&D) or subject matter expert (SME) roles to support content and a rollout across the organization.

Sample Vendors

AppLearn; Apty; Knowmore; myMeta; Pendo; SAP; tts; Userlane; WalkMe; Whatfix

Gartner Recommended Reading

Market Guide for Digital Adoption Platforms

Toolkit: Job Descriptions for the Digital Workplace

Tool: Guide to Selecting Digital Adoption Platform Vendors

Create an Enablement Continuum to Advance Digital Skills Outside of IT

Workstyle Analytics

Analysis By: Lane Severson, Helen Poitevin, Matt Cain, David Pidsley

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Workstyle analytics (WSA) is a technology category that derives insights from employees' digital footprints and data. These footprints combined with this data offer insights as to how digital work gets done, and they help organizations improve personal and team effectiveness, application and device proficiencies, while processing performance within the constraints of responsible data use.

Why This Is Important

Most organizations do not collect data on or are unable to effectively measure the impact of their investments in digital workplace technology. With WSA, digital workplace leaders can justify the additional investment required to scale new technologies and improve personal and team effectiveness, often using behavioral science. Gartner predicts that, by 2026, artificial intelligence (AI)-enabled WSA will be essential to delivering a modern digital employee experience.

Business Impact

WSA capabilities include the collection, analysis and reporting of data, coupled with next-best actions. WSA provides insights into how employee workstyles, digital tools, processes and skills affect business effectiveness. This is essential to driving technology utilization and adoption, as well as identifying productivity inhibitors. WSA capabilities are provided by multiple technology solution markets, including productivity monitoring tools, digital adoption platforms and workplace analytics.

Drivers

- Continued investment in digital workplace technologies requires IT leaders to provide insights on the impact of investment and ROI.

- Digital transformation requires visibility into the technologies that employees depend on, and how well they can use technology to improve work and productivity.

- Budget and cost pressures are driving organizations to get more from their strategic technology investments. This includes reducing the use (and cost) of nonstrategic technology and driving greater adoption of strategic technologies.

- Remote work has changed managers' ability to promote collaborative behaviors and patterns, as they could in the office. The patterns themselves have also changed to be less time-bound, requiring leaders to adjust accordingly.

- Organizations are also looking for workplace experience data to improve the return to the office by helping those struggling with remote work and for insights into potential employee engagement and well-being issues.

- IT leaders are looking for data to baseline and measure the improvement of the stability, availability and performance of the devices and systems they deliver, especially as changes are made.

- Research shows that establishing hybrid work policies and norms is critical to attracting and retaining talent. WSA tools can help discover patterns of how workers interact using digital tools. This visibility is critical to have, while defining the policies and norms.

Obstacles

- WSA capabilities often span several departments in larger organizations, which complicates sourcing processes.

- There is limited data literacy in the management population. Many people leaders are unable to describe the metrics they'd want to use to identify signs of well-being or productivity.

- Unionized workers or legal/regulatory limitations on data collection due to privacy concerns can be obstacles.

- Workers often fear employers will misuse data for employee surveillance.

- The cost and complexity of aggregating data and insights across multiple WSA tools and multiple worker segments, and the difficulty in discerning the difference between correlation and causation can be obstacles.

- Paying too much attention to experience scores and benchmarking inside analytics tools can misclassify efforts, due to algorithms that lack context or sophistication.

- There can be a delta between what organizations want from WSA and what can actually be done with the data collected.

User Recommendations

WSA has passed the Peak of Inflated Expectations as more organizations use WSA to:

- Ensure policy and legal compliance by partnering with HR and legal. Make sure that assumptions and conclusions are reviewed by analytics professionals.

- Avoid tool sprawl by reviewing existing capabilities in the current portfolio of services that have elements of WSA and understand vendor direction before buying new.

- Minimize risk by training managers on appropriate use before granting access and ensure that employees understand the intent and use of WSA.

- Avoid irrelevant comparisons to other companies by using tool-provided experience scores to baseline and measure your progress.

- Ensure that WSA can drive specific business outcomes, such as promoting worker digital dexterity, and WSA can be adapted to a wide variety of personas and use cases.

Sample Vendors

ActivTrak; Humanyze; Microsoft; Prodoscore; Scalable; Temporall; WalkMe; Worklytics; WhatFix; Userlane

Gartner Recommended Reading

Innovation Insight: Workstyle Analytics

Getting Value From Measuring Employee Experience, Productivity and Well-Being

Employee Monitoring and Privacy Laws: What Organizations Can Do?

Quick Answer: How to Communicate Employee Monitoring to Your Workforce as a Tech CEO

How to Derive Value From Employee Productivity Monitoring Technologies

Market Guide for DEX Tools

Predicts 2023: Build the Digital Day of Tomorrow

Collaborative Work Management

Analysis By: Nikos Drakos

Benefit Rating: High

Market Penetration: 20% to 50% of target audience

Maturity: Early mainstream

Definition:

Collaborative work management (CWM) tools provide task-driven workspaces to enable business users to plan, coordinate and automate their work. They combine task, project, workflow and automation capabilities, with discussions, content publishing, reporting, analytics and dashboards.

Why This Is Important

CWM empowers business users to plan, coordinate, manage and optimize common repeatable work activities and processes. CWM fills a gap between free-form collaboration and business/custom applications. CWM tools play a role in accelerating business-led democratized delivery, which is a key ingredient of digital transformation.

Business Impact

CWM improves activity coordination in a transparent and agile manner. It empowers business users to plan, execute, coordinate, optimize, and increasingly, automate day-to-day work. It makes work visible for all stakeholders and ensures delivery within timelines, budgets or resources.

Drivers

- **Remote and hybrid work.** There is a rise in interest in CWM, consistent with the increase in remote and hybrid work. In-person meetings and conversational channels lack focus and context, and are not enough to provide clarity and alignment. CWM tools are a natural complement to workstream collaboration, visual collaboration tools and meeting solutions.

- **Rising customer demand for a variety of work use cases**. Buyers are recognizing the relevance of CWM and related modeling tools such as collaborative workflow applications in supporting work processes that are collaborative by nature but may not justify purchasing or building new applications. CWM tools empower business users to plan, execute and automate work in scenarios that include everyday projects, case tracking, service operations, product management, strategic operations, goal tracking and work scheduling.

- **Interest from vendors in adjacent markets.** Vendors are entering this market from adjacent markets. These include project management, workstream collaboration, work hub/cloud office suites, employee communications, frontline worker applications, low-code development tools and business applications. Vendors are recognizing an opportunity to position their products as solutions that appeal to a much broader user base.

- **Demand generation tactics.** Vendors are trying to gain market share with freemium products that target business users and small teams directly. They are also trying to tap into departmental budgets with prebuilt work templates such as for marketing work management, objectives and key results (OKR), or intake management. One consequence of this use-case-specific vendor push is that many organizations end up purchasing more than one product, each deployed in a narrow business domain.

Obstacles

- **No enterprise role for steering large-scale deployments successfully.** CWM solutions are often introduced by end users or via small departmental deployments. There is a need for a leadership role to guide broader use that is aligned with business goals, along with guidelines and practices.

- **Lack of experience with governance at scale.** Business users are effectively using CWM tools to build applications for modeling or automating work. This has implications for roles and responsibilities in quality control, data management, release management, maintenance and long-term support.

- **Culture attitudes and skills readiness.** Some business teams/groups are not accustomed to working transparently or do not welcome more autonomy.

- **Vendor and product risk.** Some vendors are relatively small in a market that is changing rapidly where large platform vendors have yet to enter the market. Buyers face a higher vendor and product risk than in more mature markets.

User Recommendations

- Identify and prioritize relevant use cases by focusing on business-led projects and specific business operations, and by identifying stakeholders, participants, work patterns and business context to ensure business alignment.

- Audit current use of CWM tools to find pockets of tactical use and to understand business relevance and impact. Begin to rationalize choices and iterate by testing products and analyzing vendor risk and employee readiness with targeted deployments to ensure that use-case-specific needs are addressed.

- As usage increases, prepare for the long haul by establishing roles, support structures and governance principles to ensure consistency, quality and best practice diffusion across different work activities.

Sample Vendors

Adobe; Airtable; Asana; ClickUp; monday.com; Smartsheet; Wrike

Gartner Recommended Reading

Market Guide for Collaborative Work Management

Quick Answer: How Can the Digital Workplace Drive More Visibility Into How Work Gets Done?

Forecast Analysis: Social and Collaboration Software in the Workplace, Worldwide

Quick Answer: How Can We Use Microsoft 365 to Support Collaborative Work Management?

Quick Answer: What Collaboration Skills Are Necessary for New Ways of Working?

Smart Hybrid Office

Analysis By: Janel Everly, Tori Paulman

Benefit Rating: Transformational

Market Penetration: 20% to 50% of target audience

Maturity: Early mainstream

Definition:

A smart hybrid office is a combination of physical and digital environments in which people and technology-enabled systems like IoT, AI, ML, and ambient sensing interact in open, connected and intelligent ecosystems. Ultimately, it is a continuous learning environment that enables interaction between employees, devices, applications, services to drive efficiency and performance.

Why This Is Important

Gartner predicts that by year-end 2023, 48% of desk workers will be working hybrid and fully remote, up from 27% in 2019, with 39% of those working hybrid, up from 12% in 2020 in the Forecast Analysis: Knowledge Employees, Hybrid, Fully Remote and On-Site Work Styles, Worldwide. Hybrid is no longer just an employee perk but an employee expectation, challenging employers to create a human-centric employee experience and operationally efficient cost conscious physical environments.

Business Impact

The physical and digital work environments have historically been separated. The convergence of both worlds postpandemic has created a smart hybrid office that is now a strategic workforce policy, with significant impacts on countries' societal infrastructures. As companies look to reinvent the office, they must model the future workplace — one that drives creativity, embraces sustainability and inclusivity, and empowers teams and individuals to choose their environments to do their best work.

Drivers

- 2023 is a transitional year. According to the 2023 Gartner CEO Business Executive Survey, 45% of CEOs say that they require a significant or deep cultural change at their organizations. As the world transitions from an old corporate environment to a new hybrid smart office with an emerging digitally dexterous workforce, organizations must embrace the learning cycle to determine how often and when they will return to the office.

- Given this shift, office spaces are rapidly changing to adapt to pandemic-era safety protocols, reduce real estate operational costs of energy and utilities and accommodate some form of permanent hybrid work.

- As executives look to address a distributed workforce and stranded real estate assets, organization's future of work steering committees are responding by outfitting office spaces with ambient and Wi-Fi-sensing technology to support their location strategy decisions.

- The adoption of workplace experience applications is anticipated to grow by 250% in the next year. These applications incorporate AI and ML technology and integrate with IoT and ambient sensing technology, which will transform how buildings are designed and operated with the employee as the central focus.

- Organizations are leveraging deeper and richer analytics — spanning multiple data sources — that provide ongoing feedback for decision makers. These new sources not only assess the effectiveness of emerging hybrid work strategies, but also inform real estate investment (or divestment) decisions.

- Furthermore, data aggregation and dwell time insights reporting is evolving into more prominent industrywide benchmarking for organizations.

- In the 2022 Gartner Digital Worker Survey, 20% of digital workers selected face time with colleagues as the top motivator for coming to the office, the remaining 80% of digital workers have diverse motivators that are nearly equal in importance such as face time with managers or senior leaders, office equipment, ability to focus, workplace belonging or in-person IT support.

Obstacles

- The balance of power significantly shifted from employers to employees during the pandemic. Although some of this power has moved back to employers, 54% of executives indicated that future changes in flexibility will be at employees' discretion (see Current State of Hybrid Work Design: HR Leader Perspective) Therefore, a return to the office must be strategic and purposeful in how and where organizations ask employees to spend their time.

- Organizations will integrate business continuity strategies into hybrid work based on pandemic health and safety employee experiences and space requirements. The space must also be smart and flexible — to facilitate seamless shifts between focused individual work, small group collaboration and digital workplace experiences.

- This requires employers to rethink *how* work is done and measured, which forces them to reconstruct the office space in terms of size, configuration and ensure it meets human-centric employee experiences that promote performance.

User Recommendations

- Focus on the hybrid smart office as it's a compelling destination that offers workers a variety of workspaces where they can concentrate, collaborate with teammates, or connect with mentors.

- Incorporate some spaces with no technology present as Future of Work leaders, so that employees who want to have one-on-one meetings can enjoy a private, living room style space with good acoustics and no distraction.

- Replace prepandemic location-centric metrics as members of the Future of Work Steering Committee (Corporate Real Estate, HR, and IT) with human-centric hybrid office KPIs that track movement within the office, dwell times and moments for intentional collaboration in order to evaluate employee engagement, satisfaction and deep connection. It's important to understand that space is always evolving; it's never over or done, it's constant.

Gartner Recommended Reading

A Human-Centric Workplace Framework for the Future of Work

Forecast Analysis: Knowledge Employees, Hybrid, Fully Remote and On-Site Work Styles, Worldwide

Market Guide for Workplace Experience Applications

How Emerging Technology for Smarter Office Spaces Will Impact Your Workforce

Voice of the Employee

Analysis By: Laura Gardiner

Benefit Rating: High

Market Penetration: 20% to 50% of target audience

Maturity: Adolescent

Definition:

Voice of the employee (VoE) solutions collect and analyze employee opinions, perceptions and feelings. They use surveys, feedback tools and other data sources to gather worker sentiment and infer preferences, opinions and well-being. They deliver insights with actionable guidance to help improve employee engagement, experience, productivity and performance. When connected with HCM and digital workplace technologies, VoE can become a key component of a firm's "sense and respond" feedback loop.

Why This Is Important

Enterprises are grappling with the pace of change accelerated by the recent talent crunch, continued economic instability and disruptive geopolitical events. Many still use an annual survey to primarily gather employee feedback, but struggle to capture and respond to more frequent changes in perception as their workforce reacts to organizational changes, work/life collisions and market events. VoE solutions include direct surveys and other feedback tools to better capture employee perceptions, feelings, opinions and ideas.

Business Impact

More robust collection and analysis of employee feedback with actionable guidance results in:

- Earlier problem spotting and quicker response due to faster data collection and direct delivery of insights to managers.

- Deeper feedback for managers on team perceptions and performance.

- Better data for longitudinal analysis.

- Improved employee engagement, learning, development and retention.

- Efficient idea management.

- Enhanced employee experience, employment value proposition, worker performance and productivity.

Drivers

- Organizations are responding to the ongoing talent crunch and increased worker burnout/fatigue by trying to better understand employee perceptions, enable managers, drive digital workplace adoption and improve employee experience (EX). Continuous listening remains a critical element to maintaining a connection to a distributed and less connected workforce.

- Many HR clients use an annual survey as a feedback baseline but have also implemented some form of pulse measurement to increase the frequency of feedback and reduce lag between feedback, analysis and action.

- Organizations now want to go beyond merely gathering engagement-related data and expand use of VoE to communicate care, listen to a broader set of employee concerns, prioritize investments and quickly take action where necessary. They are also using VoE to measure the effectiveness of employee experience initiatives and to drive further iteration.

- VoE market requirements and customer expectations have coalesced over the past year, resulting in faster than average progression along the Hype Cycle from 2022 to 2023. Many organizations now perceive the more continuous approach to employee listening embodied by VoE to be more crucial than ever before.

- Some providers are responding to customer demand by blending VoE with other HR processes, such as performance, recognition, learning and leadership actions. Others are exploring the intersection of VoE and EX insight management. Regardless, these combinations are attempting to build an ongoing "sense and respond" capability that crosses traditional application boundaries.

Obstacles

- No VoE solution fully supports all types of VoE listening (direct survey-based, focus group-based, indirect) and analytical methods, so integrating multiple providers will be a common outcome. It may be difficult for internal stakeholders to come to an agreement on which types of listening to use and how best to consider the outputs from each type.

- Organizations often struggle to take timely action in response to VoE results, commonly due to limited delivery of manager insights and difficulties identifying solutions to the challenges raised by VoE.

- Clients with long-standing internally-built surveys may find it hard to transition to VoE platforms that require adherence to the vendor's methodologies.

- Providers acquiring VoE technology will often need two to three years to fully integrate it into their existing solution and organization. Clients implementing during that time frame will likely face integration challenges and disparate analytical tools.

User Recommendations

- Adjust VoE strategy to support faster decision timelines, including choice of metrics and measurement intervals.

- Determine what types of VoE "listening" are desired and how much weight will be given to each type.

- Define the degree to which managers will participate in VoE and also assess enterprise readiness to tightly link VoE to other talent or work processes. Results of these two tasks will help drive tool selection.

- Select the right data sources, collection/measurement methods and technologies. Assess how well the provider applies techniques such as NLP and event-triggered listening.

- Scrutinize provider integration roadmaps if all or part of VoE functionality is the result of an acquisition in the past 18 months.

- Implement selected technologies on a pilot basis, then iterate based on early feedback from employees and managers.

- Make VoE initiatives actionable by equipping stakeholders to respond quickly to anonymized, aggregated insights coming from VoE data.

Sample Vendors

Culture Amp; Glint; Medallia; Perceptyx; Qualtrics; Quantum Workplace; UKG; Workday; WTW

Gartner Recommended Reading

Market Guide for Voice of the Employee Solutions

Innovation Insight for Continuous Employee Listening and Talent Management for Increased Agility

Apply Gartner's EX-Ready Model to Optimize Employee Experience Technology Initiatives

Hybrid Work

Analysis By: Caitlin Duffy, Tori Paulman, Hanne Nieberg, Dana Stiffler

Benefit Rating: Transformational

Market Penetration: More than 50% of target audience

Maturity: Adolescent

Definition:

Hybrid work describes a working model where employees are expected to attend the office at least one day per week while being permitted to work from a location other than the office some of the time. Hybrid work models vary, i.e., offering employees the individual choice or orchestration or schedule of days in the office. Hybrid work can sometimes refer to space, as in "hybrid workplace," which describes an office that is able to support interactions that include in-person and remote employees.

Why This Is Important

When hybrid work is designed intentionally and inclusive of individual and team preferences rather than as one-size-fits-all, it is positively correlated with better business performance and talent outcomes. Employers that allow greater flexibility over where and when employees work enjoy a career brand premium over employers that don't, achieving better attraction and retention outcomes. Today, 96% of HR leaders say that they already have or will implement hybrid work.

Business Impact

Flexible hybrid, defined as a mix of on-site and remote but "offered the flexibility to choose where I work from," results in a:

- 1.6x greater likelihood of high intent to stay,

- 1.3 greater likelihood of high performance, and

- 1.8x greater likelihood of low fatigue.

According to Gartner's 2022 Digital Worker Survey, 71% currently working in a combination of locations were more productive over the last 12 months, versus 42% who worked mostly at home and 47% who worked mostly in the office.

Drivers

- The current hyper-competition for talent grants employees more bargaining power. The ability to work hybrid or remotely factors into their decisions to stay at their current jobs or look for new opportunities.

- Location is the No. 2 EVP driver of attraction across all industries (after compensation).

- Fifty-two percent of employees said the ability to work flexibly would affect whether they decided to stay at their organizations.

- Significant numbers of employees said they were willing to quit their jobs over a variety of hybrid work-related issues, such as being required to work on-site or having to take a pay cut to work remotely.

- The focus on hybrid work by both proponents and detractors has resulted in many organizations' strategies pushing slightly past the Peak of Inflated Expectations to a place where they feel the consequences of no or poor hybrid work design — disengagement, burnout, attrition, and lack of compliance.

Obstacles

- Many leaders still feel nostalgia for opportunistic interactions such as those that occur at a water cooler and equate physical presence with effectiveness, and this presents major obstacles to acceptance of hybrid work.

- Organizations risk the failure of their senior leaders, managers and work structures to keep pace with employees' changing expectations for flexibility.

- Many organizations took steps to get "back to normal" in the second half of 2022 and early 2023, reopening offices and encouraging — or even requiring — employees to work on-site some or all of the time. An extreme version of this, a so-called "hard return" to the office full-time, puts up to 39% of your workforce at risk of attrition.

- Most organizations lack applications that will help employees and managers plan the best day to visit, navigate workplaces to find services and amenities, and find colleagues outside of inviting folks to meetings in the office.

User Recommendations

- Shift from a location-centric to a human-centric work design — flexible experiences, intentional collaboration, and empathy-based management — to drive performance by resetting expectations around how, where and when we work.

- Shape work initiatives in six areas through experimentation, learning and iterating to position the organization for digital era success. These six areas are human-centric work design, rethinking the workplace, reshaping the culture, managing in a hybrid world, digital enablement, and shifting talent and skills.

- Invest in workplace experience applications to support the planning and orchestration of hybrid work and deliver a hospitality-like experience in the office (see Market Guide for Workplace Experience Applications).

- Shed industrial-era beliefs about work that constrain digital-era success by listening for outdated assumptions from your peers as well as yourself, then countering them with new data-driven insights and work design thinking.

Gartner Recommended Reading

CHRO Resource Guide for Hybrid Work Design

Redesigning Work for the Hybrid World: Opportunities for Knowledge Workers

Hybrid Work Data Overview 4Q22

Case Study: Reset Hybrid Collaboration Habits (Dropbox)

3 Ways to Help Managers Overcome Hybrid Team Challenges

Empathy-Based Management

Analysis By: Graham Waller, Jennifer Carter, Tori Paulman

Benefit Rating: High

Market Penetration: 5% to 20% of target audience

Maturity: Adolescent

Definition:

Empathy-based management trusts employees and takes their needs into account, while holding them accountable for results. It grants autonomy in how the results are achieved, and measures performance by outcomes, not inputs. We call this "accountable autonomy." This management approach is well-suited to hybrid work models and leads to superior talent outcomes.

Why This Is Important

Many managers rely on a visibility-based and transactional management approach. But it often lacks human centricity and can yield poor results as managers may miss important context that affects employee performance (e.g., struggling with caretaking responsibilities). This approach is even less effective in hybrid environments, as managers less often can physically observe employee work patterns. Managers need a new approach better-suited to supporting employees and maximizing their performance.

Business Impact

Empathy-based management shifts managers' focus from their traditional reliance on the visibility of workers' activity to what employees must do to achieve target outcomes. Employees who feel leadership is empathetic to their needs have greater likelihood to report superior talent outcomes, including high productivity (1.8x), high intent to stay (2.4x), reduced fatigue (2.2x); see Survey Analysis: Which Hybrid Work Models Boost Productivity and Other Talent Outcomes?

Drivers

- **Enabling effective hybrid and remote work.** Managers are recognizing that applying office-centric and impersonal approaches in a hybrid work environment isn't improving employee productivity or retention levels. Empathy-based management is one of the three dimensions of human-centric work design that together can improve the likelihood by 3.8 times of employees reporting high productivity and 3.2 times of high intent to stay (see Survey Analysis: Which Hybrid Work Models Boost Productivity and Other Talent Outcomes?). The 2022 Gartner Digital Worker Survey found that 77% of workers prefer to be a part of planning their hybrid work schedule.

- **Improving weak employee engagement.** Organizations continue to struggle with employee engagement, quiet quitting and retaining top talent — all impacted by employees' perception of their manager. Indeed, "manager quality" was the No. 2 reason IT employees left their organization in 1Q23 and the No. 3 reason for non-IT employees. More human leaders get results, particularly in today's work context. Human leaders have 37% more employees with high engagement and 12% more with high intent to stay than average leaders (see The New Call to Human Leadership).

- **Meeting shifting employee needs.** Employees are calling for deeper connections with their employers: They want to be seen as people, not as another number in a larger system. More human leaders who can connect in this way with employees are essential but rare: Only 29% of employees say that their leaders are effective human leaders. Organizations that directly address the emotional barriers that hold leaders back from effective human leadership can nearly double the number of human leaders they have, going from 29% to 48% (see The New Call to Human Leadership).

Obstacles

- Managers might not have the skills required for an empathy-based approach. For example, they often have little to no experience navigating vulnerable conversations.

- Managers may resist the requirement to be empathetic, believing it is not their job. They may feel that the human and caring component of management is not appropriate or necessary.

- Managers may not have the time to prioritize empathy. They often don't have calendar space that allows them to understand or support employees and don't have tools to come up with solutions for employee needs.

User Recommendations

- Embrace an empathy-based management approach that provides employees accountable autonomy to do their best work and measures them based on outcomes. Partner with HR to equip managers with the needed skills and support.

- Develop empathy by creating safe-to-fail learning environments where managers can practice both having vulnerable conversations and leading with questions.

- Create support networks, including with HR, to help managers facilitate psychologically safe discussions and healthy team dynamics.

- Sponsor a corporate capacity for empathy by creating support networks, practices, dedicated time and governance, as well as prioritizing support from HR. Reprioritize workstreams so that managers have the capacity to focus on empathy.

Gartner Recommended Reading

The New Call to Human Leadership

Survey Analysis: Which Hybrid Work Models Boost Productivity and Other Talent Outcomes?

What Workers Want: Top 10 Insights From the Digital Worker Experience Survey

Tool: A Collection of 90 Culture Hacks for the Hybrid World

Employee Well-Being Solutions

Analysis By: John Kostoulas

Benefit Rating: Moderate

Market Penetration: 5% to 20% of target audience

Maturity: Early mainstream

Definition:

Employee well-being solutions refer to the set of technologies and services extending beyond physical wellness and into mental, financial and emotional health support. Components of employee well-being include mobile apps, wearable devices, dashboards to track status, on-demand motivational and instructional content, organized events and rewards. Additional components include communities and social networking capabilities as well as gamification services (such as leaderboards and challenges).

Why This Is Important

Fatigue, stress, worry and anxiety are common symptoms in the modern workplace. In response, organizations have begun to offer new well-being programs and/or expand existing programs. Despite the large majority of employers — over 70% — offer well-being benefits across various categories (physical, financial, community, mental/emotional), only 56% of employees think their company's executives care about their well-being. Employers still need to address the issues of low employee participation and reactive well-being approaches.

Business Impact

Employers have historically deployed wellness programs focused on reducing employer healthcare costs. However, the broader value of employee well-being programs is toward reinventing EVP to deliver a more human deal that focuses on the whole person, their life experience and, ultimately, the feelings this human deal creates. This eventually increases engagement and loyalty among employees.

Drivers

Employee well-being solutions can become an engine to power employee experience and deliver well-being impact. Employee well-being solutions can consist of three main sets of capabilities: foundational, direct functional and indirect functional.

- **Foundational capabilities** include a unified user experience (UX) layer for employees and other users; analytics for employees, managers and HR to show participation and impact of the various programs; and integration components to connect the various functional capabilities.

- **Direct functional capabilities** include functionalities to help employees support the various aspects of well-being: physical, mental, financial, community/social and digital. These functionalities are used solely for the purposes of well-being support and include technology (e.g., mobile applications, wearable applications), content (e.g., learning resources) or interaction with experts (e.g., counseling, clinical support).

- **Indirect functional capabilities** include functionalities not used solely for well-being that support effectiveness of related programs. Examples include:

  - Voice of the employee (to provide employee sentiment about well-being programs)

  - Rewards and recognition (to provide rewards relevant to well-being achievements)

  - Learning experience (to support learning activities toward well-being)

Obstacles

- **The business value of such an initiative is difficult to quantify.** This is particularly true as participation rates are generally still low (typically under 50%) despite more time and effort in communicating well-being offerings. Although midmarket organizations increasingly make well-being investments, larger employers typically have the budget for such initiatives without a rock-solid business case.

- **Organizations with a reactive mindset around well-being.** This affects the ways organizations are measuring the impact of well-being programs, connecting data beyond absence and retention rates. This data is often unstructured and requires deeper analysis to uncover impact.

- **Limited insights with regards to the use of well-being solutions.** Organizations provide applications and services to their employees as a benefit but fail to regularly ask for employee feedback with regards to their use and perceived value.

- **Fragmentation of solutions.** The employee well-being solutions landscape has been very fragmented, which makes it difficult to streamline user experience and analytics.

User Recommendations

- Pilot where possible to justify further investment. Programs can start as a grassroots effort to reduce stress, to become more physically or mentally active or to create a greater sense of team spirit. Well-being coaches, and recognition and rewards tools, can play a key role in encouraging participation and building communities.

- Enroll senior leadership as champions for well-being. Employee well-being becomes more strategic and transformational when connected to formal programs and HR processes.

- Plan how employee well-being technology will connect with your wider HR technology ecosystem. Employee well-being can be delivered via point solutions, employee experience technologies and HCM suites. Buyers should first review the capabilities offered by existing providers, then consider additional point solutions if needed. If deploying multiple point solutions, consider utilizing providers that act as data, workflow and analytics aggregators.

Sample Vendors

ADP; Alight; Benevity; BetterUp; Even; Limeade; TELUS Health; Thrive Global; Unmind; Virgin Pulse

Gartner Recommended Reading

Innovation Insight: Employee Well-Being Solutions

Virtually Facilitated Social Connections

Analysis By: Annika Jessen, Caitlin Duffy

Benefit Rating: Moderate

Market Penetration: 20% to 50% of target audience

Maturity: Early mainstream

Definition:

Virtually facilitated social connections are strategies that leverage technology to facilitate and foster meaningful connections and relationships in a distributed environment. These may employ technology platforms to help employees identify new social connections and networks based on elements such as shared experiences, circumstances, role requirements, personal preferences, geographic locations, social needs, career aspirations, and interests both inside and outside of work.

Why This Is Important

Connectedness is a key element of the employee experience but in a hybrid world, where work is more distributed, employees' weak ties get weaker while their strong ties get stronger. When employees feel disconnected, they are less likely to be high performers or stay at their organization. Leveraging technology to virtually facilitate new social connections among employees is a low-effort, high-reward strategy to facilitate connection in a fragmented environment, and improve employee engagement and performance.

Business Impact

Virtually facilitated social connections help employees build more relationships, which positively impacts a number of talent and business outcomes:

- Employees in organizations that intentionally build connections are 12 times as likely to feel connected to their colleagues and five times as likely to be on a high-performing team.

- Human-to-human connections boost successful collaboration by 23%.

- Connectedness increases employee performance and employee retention by 37% and 36%, respectively.

Drivers

- Flexibility innate to hybrid work provides organizations with clear benefits for employee well-being and performance and for expanding their pool of potential talent. But, flexible work can make it more difficult for employees to coordinate with their teams and connect with co-workers throughout the organization.

- Hybrid or remote knowledge workers have fewer embedded opportunities for social interactions than those working in a fully on-site model. Sixty-five percent spend less time in offices than before the COVID-19 pandemic and are meeting with their teams in-person two days fewer per week than before.

- Many employees struggle to maintain relationships with "weak ties," that is, connections with co-workers they do not work with or see regularly.

- A distributed workforce can make employees feel removed from their colleagues, their organizations and the work itself. When employees feel this way, they're 56% less likely to be a high performer, 83% less likely to be on a highly collaborative team and 68% less likely to stay at their organization.

- Rather than lose the benefits of hybrid work with a full return to the office, organizations are experimenting with ways to support the new social challenges that come with hybrid work.

- Finding that sense of belonging, connection to organizational culture and overall community is possible virtually, and it's most efficient and accessible when facilitated by the organization.

Obstacles

- Disagreement among leadership about investing in virtually facilitated social connections versus defaulting to daily on-site work.

- Potential assumption that it is the employee's sole responsibility to connect with their colleagues.

- Disagreement about the importance of virtual social connections, whether they are essential to the employee's performance, and whether virtually facilitating connections is part of HR's role.

- An initial time investment to identify the technology platforms needed to facilitate connections, develop any "connection needs" assessments and determine who owns facilitated connections.

- The best virtually facilitated connections may also require a monetary investment in a new technology platform, membership with an existing provider or an add-on feature to current technology.

- Determining appropriate incentives for employee participation.

- An intentional implementation strategy to ensure employees adopt the technology or practice, and build habits to use it regularly.

User Recommendations

- Recognize that employees have different connection needs based on personal preferences, role requirements and career aspirations.

- Create an assessment to help employees identify their connection needs. Aggregate this information at various levels to understand different needs across the organization.

- Map connection opportunities (e.g., social hours, employee resource group contributions, personal development sessions, virtual games and activities) to different employee needs and preferences. Employees can identify opportunities that map to their needs.

- Embed moments of facilitated connection into employees' day-to-day work.

- Facilitate connections through shared experiences, circumstances, and interests inside and outside of work (e.g., career and life stages, shared interests) to broaden employees' networks beyond their immediate teams.

- Leverage add-on options in existing technologies, such as a connection bot on a digital messaging platform. Use the bot to help employees find shared interests, discuss preselected topics or prompts, or converse with a randomly assigned partner.

Gartner Recommended Reading

Case Study: Value-Driven Future of Work Framework to Enable Performance

Case Study: Personalized Community Building to Drive Connection in a Distributed Workforce

Culture in a Hybrid World

3 Strategies to Engage Gen Z Employees

Recognition and Reward Systems

Analysis By: Chris Pang

Benefit Rating: Moderate

Market Penetration: 5% to 20% of target audience

Maturity: Early mainstream

Definition:

Employee recognition and reward systems allow organizations to show appreciation to individuals "in the moment" for accomplishments and behaviors desired by the organization. Rewards can be monetary- or nonmonetary-based.

Why This Is Important

Given the challenges in the macroenvironment, many organizations need to reenergize company culture and organizational morale to improve talent attraction, engagement and retention. These challenges are not dependent on company size, especially in organizations where remote working is the norm.

Business Impact

Recognition and reward technology can improve an employee's morale, motivation and sense of belonging. It can help to drive and sustain initiatives such as job candidate referrals, company well-being initiatives, health and safety, and environmental, social and corporate governance (ESG) programs.

Drivers

- Improving talent retention and attraction for in-demand skills and talented individuals

- Driving an elevated customer experience by using recognition and reward to positively influence employee engagement

- Providing motivation outside of merit and bonus plans, which typically occur only once or twice a year

- Empowering individuals to recognize others for "going the extra mile" or exceptional work on a one-on-one or a one-to-many basis

- Allowing leaders to track progress on initiatives such as ESG and other efforts outside of revenue targets

Obstacles

- Unclear or wavering management sponsorship and support, with not enough ROI for HR leaders to prioritize recognition and reward programs ahead of other initiatives

- Reduced scope and/or lack of budget for monetary awards

- When current or previous experience with a recognition and reward program involves a process/technology that is unchanged since the original implementation

- Lack of awareness that this category offers much more than a work anniversary gifting tool

- Lack of change management and internal commitment to continually evolve the recognition and reward program

- Perception of recognition and reward as being a tactical compensation and benefits project

- Fear of individuals gaming the process/system and uncertainty of recognition and reward process governance

- Buyer confusion because the market is crowded with overlapping offerings from HR, talent, employee experience, and recognition and reward solution providers

User Recommendations

- Elevate the impact of recognition with a reward component. Use in-built reporting and analytics to gain insight into where and why there are hot and cold spots of usage.

- Invest time in solution design and internal marketing to push awareness and ongoing system usage and engagement. Make it easy to give and "see" recognition, and encourage leadership to regularly promote the program.

- Use recognition to encourage and maintain cultural cohesion and employee engagement to unite employees across work styles with the mission, principles and culture of the company. Examine the possibility of integrating recognition systems with performance management systems to enhance the 360-degree view of the employee.

Sample Vendors

Achievers; Awardco; BI WORLDWIDE; Kudos; O.C. Tanner; Semos Cloud; Vantage Circle; Workhuman; WorkTango; Xoxoday

Gartner Recommended Reading

Innovation Insight: Continuous Employee Listening and Talent Management for Increased Agility

Tech CEOs: Use Recognition and Reward Technology to Drive Talent and Culture Efforts

Top Practices for Tech CEOs' Recognition and Reward Programs

Indoor Location for People Tracking

Analysis By: Tim Zimmerman, Annette Zimmermann

Benefit Rating: High

Market Penetration: 20% to 50% of target audience

Maturity: Early mainstream

Definition:

Indoor location for people tracking is an umbrella of technologies dedicated to 2D and 3D tracking the location of human beings in an indoor context. The precision of these technologies can vary from a few meters to a few centimeters.

Why This Is Important

Tracking people is important in a wide range of industrial, healthcare and personal security or safety situations. It poses different technical challenges depending on the position of the human body or the proximity of the tracking tag to the body. In addition, the energy used for communication may be absorbed or blocked, leading the application to "lose track" of a person if the right technology is not selected.

Business Impact

Over 70% of enterprises looking to track assets also wanted to track people as part of a cohesive solution. From a safety standpoint, not being able to track people in dangerous situations or environments results in not only avoidable injuries but also loss of life. In certain geographies and industries, tracking people for safety reasons can be mandated by law.

Drivers

- Safety and compliance for industrial environments including factories or plants where fumes, chemicals or temperatures create a safety risk, and construction sites for employee safety and anti-collision purposes (with equipment such as forklift trucks).

- Safety in healthcare pertaining to infants or the elderly, or hospitality workers who may not be aware when they are in a dangerous situation.

- Process optimization when employees are performing identified tasks such as tracking patients in hospital care workflows either in real time or geofenced for safety concerns. This can also apply to time and motion standards in manufacturing or other industries.

Obstacles

- The biggest issue in people tracking continues to be privacy. People don't want to be arbitrarily tracked and want visibility on how the tracking data is used. In some countries, government councils may have to approve of such a solution and again in other situations, it may be illegal.

- Organizations must choose the right technology for the desired outcome. Some technologies cannot guarantee the location of the person being tracked 100% of the time.

- Cost, which may manifest itself as the cost of the tag (ranging between a few dollar cents for an RFID wristband to an over 100-dollar badge) or the cost of the infrastructure necessary to capture the information.

User Recommendations

- Define the use case to ensure that the frequency of data collection and accuracy of the location meet the documented requirements. Vertical market solutions such as healthcare or construction may have industry-specific requirements or certifications.

- Consider additional use cases including data analytics or geofencing.

- Implement a center of excellence that reviews the limitations of differing radio frequencies, infrastructure implementation issues, form factor of tags, wristbands or lanyards that are needed to achieve the desired location, and battery life as well as competitive solutions.

- Deploy the correct technology because vendors may try to sell a solution that is applicable for assets but not for people tracking.

- Construct an ROI for any people tracking location investment since the cost of tags varies widely.

- Address pushback from workers' councils and unions by communicating a people-tracking project very openly and transparently, helping to loop in all stakeholders.

Sample Vendors

AiRISTA Flow; CenTrak; HID Global; Litum Technologies; Midmark; Quuppa; Sonitor Technologies; Zebra Technologies

Gartner Recommended Reading

Magic Quadrant for Indoor Location Services

Critical Capabilities for Indoor Location Services

Market Guide for Indoor Location Application Platforms

Competitive Landscape: Indoor Mapping

Desktop as a Service

Analysis By: Stuart Downes, Mark Margevicius, Tony Harvey, Craig Fisler, Sunil Kumar, Eri Hariu

Benefit Rating: High

Market Penetration: More than 50% of target audience

Maturity: Early mainstream

Definition:

Desktop as a service (DaaS) is the provision of virtual desktops by a public cloud or service provider. DaaS is bought by IT leaders seeking to provide desktop or application experiences from virtual machines accessed using a remote display protocol. DaaS vendors incorporate a fully managed control plane service into their offerings, which facilitates user connections and provides a management interface. DaaS can be delivered preconfigured as a service or can be delivered as a DaaS platform.

Why This Is Important

With DaaS, no data resides on the endpoint, offering a solution that can increase security, resilience and application responsiveness for remote workers. DaaS offers scalable services without adding infrastructure, allowing clients to appropriately size and consume their environments hour by hour, day by day, and month by month; however, not all DaaS solutions offer such granular billing options.

Business Impact

With DaaS, IT leaders can increase security for desktops and applications. Other benefits of DaaS, compared to traditional VDI, include:

- Flexible procurement options that allow scalable deployments.

- Simplified rollout of services to new geographic regions.

- Applicability to a broader range of industries and use cases.

- Lesser skills required for IT operations teams to deploy and operate virtual desktops and applications.

- More rapid expansion or contraction of workloads.

Drivers

DaaS will continue to mature and witness increased adoption through 2026. The technology has moved through the Trough of Disillusionment onto the Slope of Enlightenment due to the following factors:

- DaaS enables business continuity and remote work, with no data residing on the endpoint.

- The technology securely extends services to external contractors and third parties.

- Endpoint computing models allow device-independence and bring your own PC (BYOPC) endpoints.

- On-demand desktops enable a financial model that allows scaling of cloud resources and an operating expenditure (opex) model.

- DaaS can be purchased for short periods, enabling use cases such as seasonal workers or short-term contracts.

- DaaS enables rapid access to systems during mergers, acquisitions and divestitures.

- Rich graphics use cases like engineering, games development, video editing and geographic information systems (GIS) benefit from GPU-enabled workstation-class virtual desktops and applications.

- DaaS can be delivered to users in hours. The supply of a physical device, on the other hand, can take weeks, incur shipping costs and retrieval is not always guaranteed.

- The technology eliminates the need for complex and static VDI implementations.

Obstacles

- Usually, the business case turns positive only when security and user cost impacts are included.

- Organizations struggle when there is a change in financial models from capex to opex.

- GPU use cases can be extremely expensive and often need advanced protocols, which increases complexity.

- Multimedia streaming, web meetings and video call performance in DaaS are not equivalent to that of a physical endpoint.

- Performance issues may occur in DaaS because application architectures introduce network-related issues (i.e., latency and hairpinning).

- Some DaaS solutions require self-assembly, which, although simpler than VDI, can still be too complex for some clients.

- The full range of desktop management requirements may not be completely fulfilled by DaaS providers.

- Microsoft product terms that prevent the installation of Microsoft 365 applications on "Listed Providers" (see 3 Compliance Questions to Ask When Licensing Microsoft Windows and Office for VDI and DaaS).

User Recommendations

■ Get familiar with the three DaaS market segments — self-assembled DaaS, vendor-assembled DaaS and vendor-managed DaaS — and select a vendor from the appropriate segment (see Market Guide for Desktop as a Service).

■ Ensure your operational teams have the necessary skills if you select self-assembled DaaS solutions.

■ Select a vendor-defined DaaS or vendor-managed DaaS solution if you do not have the operational skills.

■ Choose a DaaS vendor whose services best align with your requirements; even within each segment, there are differences between the services vendors offer.

■ Optimize multimedia streaming, web meetings and video calls.

■ Select a DaaS vendor that offers the billing granularity you require.

Sample Vendors

Alibaba; Amazon; Anunta; ATSG; Citrix Systems; Microsoft; Nutanix; oneclick; VMware; Workspot

Gartner Recommended Reading

Market Guide for Desktop as a Service

How to Choose a Desktop Delivery Model for the Digital Workplace

Video: PCs, Virtual Desktops or DaaS: What's the Best Fit for Midsize Enterprises

3 Compliance Questions to Ask When Licensing Microsoft Windows and Office for VDI and DaaS

Appendixes

Hype Cycle Phases, Benefit Ratings and Maturity Levels

Table 2: Hype Cycle Phases

(Enlarged table in Appendix)

Phase ↓	Definition ↓
Innovation Trigger	A breakthrough, public demonstration, product launch or other event generates significant media and industry interest.
Peak of Inflated Expectations	During this phase of overenthusiasm and unrealistic projections, a flurry of well-publicized activity by technology leaders results in some successes, but more failures, as the innovation is pushed to its limits. The only enterprises making money are conference organizers and content publishers.
Trough of Disillusionment	Because the innovation does not live up to its overinflated expectations, it rapidly becomes unfashionable. Media interest wanes, except for a few cautionary tales.
Slope of Enlightenment	Focused experimentation and solid hard work by an increasingly diverse range of organizations lead to a true understanding of the innovation's applicability, risks and benefits. Commercial off-the-shelf methodologies and tools ease the development process.
Plateau of Productivity	The real-world benefits of the innovation are demonstrated and accepted. Tools and methodologies are increasingly stable as they enter their second and third generations. Growing numbers of organizations feel comfortable with the reduced level of risk; the rapid growth phase of adoption begins. Approximately 20% of the technology's target audience has adopted or is adopting the technology as it enters this phase.
Years to Mainstream Adoption	The time required for the innovation to reach the Plateau of Productivity.

Source: Gartner (July 2023)

Table 3: Benefit Ratings

Benefit Rating ↓	Definition ↓
Transformational	Enables new ways of doing business across industries that will result in major shifts in industry dynamics
High	Enables new ways of performing horizontal or vertical processes that will result in significantly increased revenue or cost savings for an enterprise
Moderate	Provides incremental improvements to established processes that will result in increased revenue or cost savings for an enterprise
Low	Slightly improves processes (for example, improved user experience) that will be difficult to translate into increased revenue or cost savings

Source: Gartner (July 2023)

Table 4: Maturity Levels

(Enlarged table in Appendix)

Maturity Levels ↓	Status ↓	Products/Vendors ↓
Embryonic	In labs	None
Emerging	Commercialization by vendors Pilots and deployments by industry leaders	First generation High price Much customization
Adolescent	Maturing technology capabilities and process understanding Uptake beyond early adopters	Second generation Less customization
Early mainstream	Proven technology Vendors, technology and adoption rapidly evolving	Third generation More out-of-box methodologies
Mature mainstream	Robust technology Not much evolution in vendors or technology	Several dominant vendors
Legacy	Not appropriate for new developments Cost of migration constrains replacement	Maintenance revenue focus
Obsolete	Rarely used	Used/resale market only

Source: Gartner (July 2023)

Acronym Key and Glossary Terms

Hybrid Worker	Employees who are expected to attend the office at least one day per week while being permitted to work from a location other than the office some of the time.
Workplace Experience Apps (WEX)	A discrete application, well-defined module or cohesive set of capabilities that supports various aspects of the journey as employees interact with the office or corporate hosted workplaces. These applications simplify the process of planning a visit, reserving available space and determining what amenities are provided. They are used to explore and reserve workspaces, navigate the workplace, find colleagues, plan the best days to attend the workplace, access services and ensure that employees could feel safe in a future post-pandemic workplace.
Hybrid Workplace	Describes a workplace or office that is able to support interactions that successfully include in-person and remote employees.
In-Person Worker	Employees who never work remotely on an average week.
Remote Worker	Employees who work 5 or more days remotely on an average week.

Evidence

[1] **2022 Future of Work Reinvented Survey**

[2] **2022 Gartner Digital Worker Survey:** This survey sought to understand workers' technological and workplace experience and sentiments. The research was conducted online from September through November 2022 among 4,861 respondents from the U.S. (n = 1,564), China (n = 1,167), the U.K. (n = 1,072) and India (n = 1,058). Participants were screened for full-time employment in organizations with 100 or more employees and were required to use digital technology for work purposes. Ages ranged from 18 through 74 years old, with quotas and weighting applied for age, gender, region and income, so that results are representative of working country populations. We defined "digital technology" as including any combination of technological devices (such as laptops, smartphones and tablets), applications and web services that people use for communication, information or productivity.

Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

2023 Gartner Global Labor Market Survey: This panel survey is carried out once every month, with approximately 6,000 participating employees globally. Responses are collected across 40 different countries in 15 languages and then aggregated to generate quarterly/annual findings. The 1Q23 Gartner Global Labor Market Survey is based on responses from a total of 18,002 employees globally, including 2,844 remote-only employees, 7,003 in-person employees and 8,155 hybrid employees.

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Future of Work Reinvented: Managing in a Hybrid World

Market Guide for Workplace Experience Applications

Hybrid Work Data Overview 1Q23

Table 1: Priority Matrix for Hybrid Work, 2023

Benefit	Years to Mainstream Adoption			
↓	Less Than 2 Years ↓	2 - 5 Years ↓	5 - 10 Years ↓	More Than 10 Years ↓
Transformational	Digital Employee Experience Hybrid Work	Everyday AI Smart Hybrid Office Workplace Experience Apps	Internal Talent Marketplaces	Radical Flexibility/Flexible Work
High	Desktop as a Service Employee Communications Applications Indoor Location for People Tracking Intentional Collaboration Visual Collaboration Applications	Collaborative Work Management DEX Tools Digital Adoption Platforms Empathy-Based Management Influencer Network Unified Endpoint Security Voice of the Employee Workstyle Analytics	Coaching/Mentoring Applications Digitally Enabled DEI Four-Day Workweek Global Employer of Record Solutions Superapps Team Unity	Digital Twin of the Employee Workforce Nudgetech
Moderate		Appointment Scheduling Software Collaboration Equity Employee Journey Map Employee Well-Being Solutions HR Virtual Assistants	Recognition and Reward Systems Virtually Facilitated Social Connections	

Benefit	Years to Mainstream Adoption			
↓	Less Than 2 Years ↓	2 - 5 Years ↓	5 - 10 Years ↓	More Than 10 Years ↓
Low			Employee Enablement Virtual Co-working Space	

Source: Gartner (July 2023)

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Table 2: Hype Cycle Phases

Phase ↓	Definition ↓
Innovation Trigger	A breakthrough, public demonstration, product launch or other event generates significant media and industry interest.
Peak of Inflated Expectations	During this phase of overenthusiasm and unrealistic projections, a flurry of well-publicized activity by technology leaders results in some successes, but more failures, as the innovation is pushed to its limits. The only enterprises making money are conference organizers and content publishers.
Trough of Disillusionment	Because the innovation does not live up to its overinflated expectations, it rapidly becomes unfashionable. Media interest wanes, except for a few cautionary tales.
Slope of Enlightenment	Focused experimentation and solid hard work by an increasingly diverse range of organizations lead to a true understanding of the innovation's applicability, risks and benefits. Commercial off-the-shelf methodologies and tools ease the development process.
Plateau of Productivity	The real-world benefits of the innovation are demonstrated and accepted. Tools and methodologies are increasingly stable as they enter their second and third generations. Growing numbers of organizations feel comfortable with the reduced level of risk; the rapid growth phase of adoption begins. Approximately 20% of the technology's target audience has adopted or is adopting the technology as it enters this phase.
Years to Mainstream Adoption	The time required for the innovation to reach the Plateau of Productivity.

Phase	Definition

Source: Gartner (July 2023)

Table 3: Benefit Ratings

Benefit Rating	Definition
Transformational	Enables new ways of doing business across industries that will result in major shifts in industry dynamics
High	Enables new ways of performing horizontal or vertical processes that will result in significantly increased revenue or cost savings for an enterprise
Moderate	Provides incremental improvements to established processes that will result in increased revenue or cost savings for an enterprise
Low	Slightly improves processes (for example, improved user experience) that will be difficult to translate into increased revenue or cost savings

Source: Gartner (July 2023)

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