Workforce Productivity & Collaboration

Covering the productivity, collaboration, communications and compliance technologies that are shaping the future of the collaborative work environment.

The Workforce Productivity and Collaboration (WPC) channel delivers market insight and strategic counsel to those deploying, providing and investing in the technologies shaping the future of collaborative work. A key theme for our agenda is how workforce tools are becoming more integrated, intelligent, social, self-organizing, automated and secure, which in turn is redefining how businesses think of their workflows and business processes. In essence, we track the technologies driving this future of work.
Introduction

Understanding what the future of work will look like is a growing concern for enterprises. Improving the workforce’s productivity and collaboration experience is a transformation priority for many IT departments because business leaders are realizing that the aggregate friction across most of their employees’ day-to-day work hugely impedes their wider digital transformation strategies.

Despite this obvious and growing concern, there is still more aspiration, hyperbole and pithy aphorism than there are substantive ways of understanding the future of work. This is especially true when it comes to understanding the relationship between technologies and new work habits, organizational design and management practices, and fundamentally how businesses need to organize to be competitive in the digital age.

The Workforce Productivity & Collaboration channel is focused on providing that more substantive view. Our overall point of view is that there has never been a more disruptive time in the business applications landscape, with two opposing forces – the continuing expansion of the application estate and employee demand for more consolidation in the estate – birthing the next big shift. New systems of delivery are emerging: singular planes uniting strategy, planning, resource and skills management, and work execution. For businesses, this shift will catalyze new ways of organizing their functional and lines of business, rewriting much of the received wisdom around the relationship between employers and employees.

This is having a strong gravitational pull on much of the rest of the tooling landscape. As businesses look to build in more resilience and elasticity within their workforce, a more joined-up ‘people management stack’ is emerging – from top to bottom, the improved ability to appraise, develop, manage and plan around their skills base.

Secondly, and partly as a result of the coronavirus pandemic, we anticipate that businesses will look to conduct more of their interactions in the virtual world. This will catalyze much-needed innovation in collaboration and communications technologies.

Finally, the same stimulus that will lead to a more joined-up people management stack, and encourage more virtual engagements, will lead to more empowerment at the edge of the workforce. Disruptively dynamic business environments will accelerate the countervailing force of more agility and empowerment at the edge and across the long tail of workforce processes, whether as no-code workflow automation, flexible digital workspace canvases, new immersive experiences or other new capabilities. A maker-movement vibe will come to characterize productivity software going forward.

Upcoming Research on Workforce Productivity & Collaboration

DEMAND-SIDE RESEARCH: VOICE OF THE CUSTOMER

The Voice of the Customer product suite provides survey-based insights from our global panels of IT purchasing decision-makers across enterprises, service providers and technology consumers.

MACROECONOMIC OUTLOOK

Through quarterly survey-based data and insight from our Leading Indicator panel of technology users, Macroeconomic Outlook examines global macroeconomic conditions and factors such as employment trends, price pressures and credit availability to monitor the state of corporate fitness.
**VOICE OF THE ENTERPRISE (VOTE)**
Combining 451 Research’s industry-leading analysis with data from The 451 Alliance, a global community of IT professionals, Voice of the Enterprise tracks adoption across thousands of organizations and exposes the major opportunities for enterprises, IT vendors, suppliers and investors. The following VotE products are part of the Workforce Productivity & Collaboration Channel.

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<th>Workforce Productivity &amp; Collaboration</th>
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<td>Quarterly survey-based data and insight on what’s driving the future of work from IT and line-of-business technology decision-makers, managers and employees</td>
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<th>Digital Pulse</th>
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<td>Survey-based data and insight collected six times per year from our global panel of enterprise IT decision-makers, providing a unified, top-level view of enterprise IT strategies and initiatives and the underlying business and technology drivers</td>
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**VOICE OF THE SERVICE PROVIDER (VSP)**
Through semiannual surveys and in-depth interviews with a curated global service provider panel, 451 Research’s Voice of the Service Provider helps to qualify and quantify buying behaviors, business drivers and strategic priorities for the expanding universe of public cloud providers, hosters, MSPs, telcos, systems integrators, SaaS companies and colocation providers. Each survey has a focused theme.

**VOICE OF THE CONNECTED USER LANDSCAPE (VOCUL)**
451 Research leverages its Leading Indicator panel of business and technology professionals, who are vetted through an application process that admits those with the lifestyle and professional attributes that provide a forward-looking view of technologies, companies and the macro economy well in advance of other sources. These insights are analyzed against companion results from quarterly, population representative surveys of US consumers based on Census Bureau statistics, which confirm how the leading indicator trends are unfolding in the mass market. Together, they provide a multidimensional and comprehensive package of survey insights that is unique in the marketplace.

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<th>Communications &amp; Media</th>
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<td>Quarterly strategic insight on trends including customer satisfaction, loyalty, and marketing and shopping preferences of communications service providers; intent to buy and cord-cutting trends; adoption of and satisfaction with streaming devices; and data plans</td>
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SUPPLY-SIDE RESEARCH
MARKET MONITOR & FORECAST
Understanding the pace of growth and identifying the segments and industries driving value in the market is the focus of 451 Research’s market tracking and forecasting methodologies. Through regular updates, 451 Research delivers its tracking and forecasting of the supply of key business application market indicators by region and country.

Workforce Productivity & Collaboration: Communications Platform as a Service
Proprietary forecast based on a bottom-up analysis of 40 vendors’ current revenue and growth expectations through 2024; includes an overview of the CPaaS market and two sub-segments, market and sub-segment revenue estimates and growth forecasts, and a detailed analysis of the CPaaS competitive landscape by product portfolio

TECHNOLOGY & BUSINESS INSIGHT REPORTS

CPASS BUYING GUIDE
Analyst: Raúl Castañón-Martínez
Publication Date: Q1 2021
Digital transformation became a priority in 2020, with organizations accelerating the digitization of the customer and employee experiences in response to the pandemic. Communications platform as a service will play a central role; in this report, we provide an overview of the competitive landscape and key considerations for evaluating a solution.

UNDERSTANDING THE WORKFORCE IS KEY TO POST-COVID-19 ESG STRATEGIES
Analyst: Chris Marsh
Publication Date: Q1 2021
The environmental, social and governance (ESG) mandate is gaining influence over business strategy and investor decisions, yet 15 years on from when the term was first coined, it remains immature. Disruptions from digitization, globalization and COVID-19 are making a good case for the ESG mandate to mature its social criteria to include how businesses and the societies in which they operate can create a resilient skills base, dynamic career experiences and long-term opportunities for the workforce. That will be important if ESG is to be a meaningful guide for economies and businesses as they navigate these disruptive times. In this report we’ll highlight some of the emerging hallmarks of these new operating cultures and the technology trends that are increasingly mediating them.

THE BUSINESS COMMUNICATIONS LANDSCAPE A YEAR ON
Analyst: Raúl Castañón-Martínez
Publication Date: Q2 2021
A year on from the outbreak of the COVID-19 pandemic, this report will take stock of the business communications and collaboration landscape. Having received a huge boost by the shift to remote work with elevated spend by technology decision-makers and new impetus to innovate ways to support these new work styles, we will look at key market dynamics, players and competitive dynamics to assess the state of play for this critical category.
THE EMERGENCE OF VISUAL AND IMMERSIVE EXPERIENCES IN PRODUCTIVITY SOFTWARE

**Analysts:** Rosanna Jimenez, Chris Marsh  
**Publication Date:** Q3 2021

An interesting trend in workforce tooling is the growing introduction of more visual and immersive modalities in the user experience – whether it's data visualizations, diagramming tools, no-code drag-and-drop and other more visual workspace canvases, voice interactions, or virtual and augmented reality. This report will look at the different ways this is happening and what the implications are for the evolution of the workforce tooling category.

HR TECHNOLOGY BUYING GUIDE

**Analyst:** Conner Forrest  
**Publication Date:** Q4 2021

It's an interesting time for HR technology: Businesses are looking for new ways to support the shift to remote work, the employee experience is evolving into a more productivity-focused strategy, and the big players are innovating to expand the edges of the category. This report will provide an overview of the competitive landscape across the different HR technology domains and outline key considerations for evaluating a solution.

PREVIEW: TRENDS IN WORKFORCE PRODUCTIVITY & COLLABORATION 2022

**Analysts:** Chris Marsh, Raúl Castañón-Martínez, Conner Forrest, Rosanna Jimenez  
**Publication Date:** Q4 2021

This report provides a view of key trends that will affect the market in 2022. It details the top trends, likely impact and recommendations for each.

SPOTLIGHT REPORTS

**Q1 2021**

Looking back at employee engagement in 2020: what changed and what didn’t in the COVID-19 year (Rosanna Jimenez)  
CPaaS in 2021: where next after a year of intense activity and significant M&A (Raúl Castañón-Martínez)  
Systems of delivery: what is the evidence for the emergence of these new platforms? (Chris Marsh)

**Q2 2021**

Learning and development technology: What are the innovations and how will the category evolve (Conner Forrest)  
Work management vendors: Is net new category creation or absorption into other categories more likely? (Chris Marsh)  
The big productivity suites: At the vanguard or losing their grip on users? (Chris Marsh)
About 451 Research

451 Research is a leading information technology research and advisory company focusing on technology innovation and market disruption. More than 100 analysts and consultants provide essential insight to more than 1,000 client organizations globally through a combination of syndicated research and data, advisory and go-to-market services, and live events. Founded in 2000, 451 Research is a part of S&P Global Market Intelligence.

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