

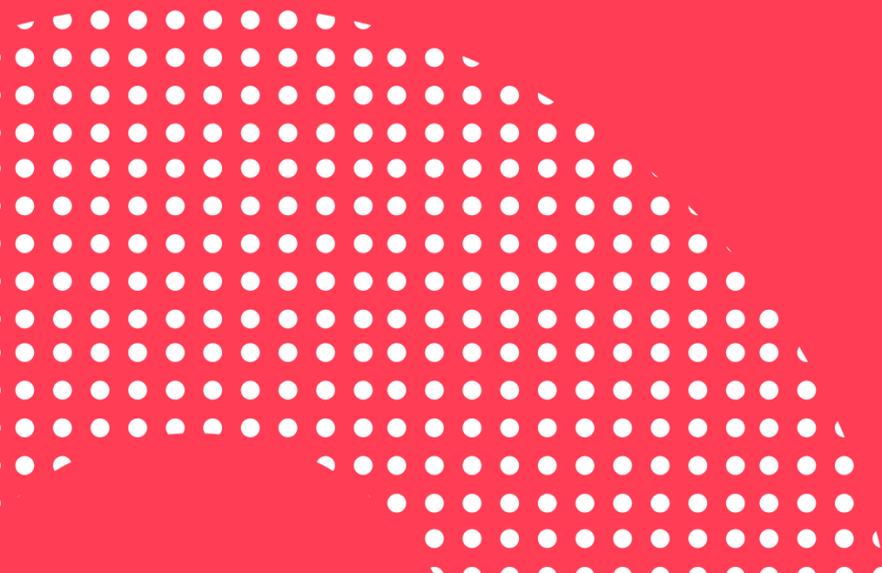


The Future of [the] Work[place]



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Letter from Cleverly

Cleverly can remember when remember when the future of the workplace revolved around activity-based zones and what amenities were most important to employees and occupants.

It would be worrying if we could not remember since this was only just pre-pandemic in January 2020!

In light of all that has transpired since our last report on 'Trends in Workplace Management' this year we are focused on 'The future of Work' and 'The Future of the Workplace'. Unsurprisingly, it involves quite a lot of technology utilisation.

Let's hope this one touches on some issues that are relevant in another 12 months' time.

Stay safe.



Introduction

In between all that has been going on with pandemics and productivity declines, there have been significant advances in a number of technologies that are going to dramatically change the way we all work.

Advances such as GPT-3 signal and increasing capabilities of machine vision mean that impact will be felt in many roles that even a few years ago would have been considered off limits to automation.

What does this mean for the work we do and what sort of spaces will we need to do it? We will have a look into these and related questions over the next few pages.

Some of this work has been done on the back of surveys conducted by Cleverly and some owes a debt of gratitude to others' research. Where appropriate we have cited sources and/or where to go for additional information.



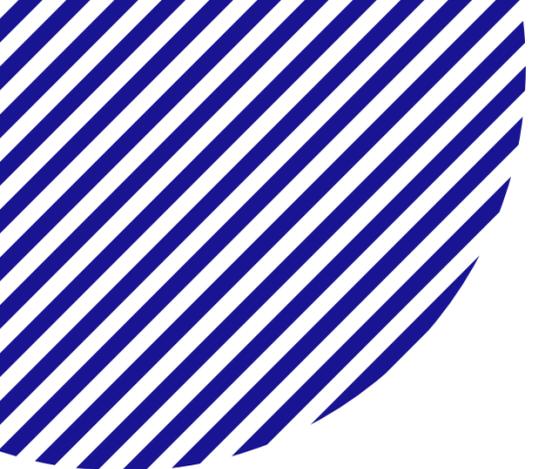
Headlines

COVID-19 has prompted companies to re-evaluate their **ways of working and workplace requirements.**

Process and workflow automation has become front of mind for employers.

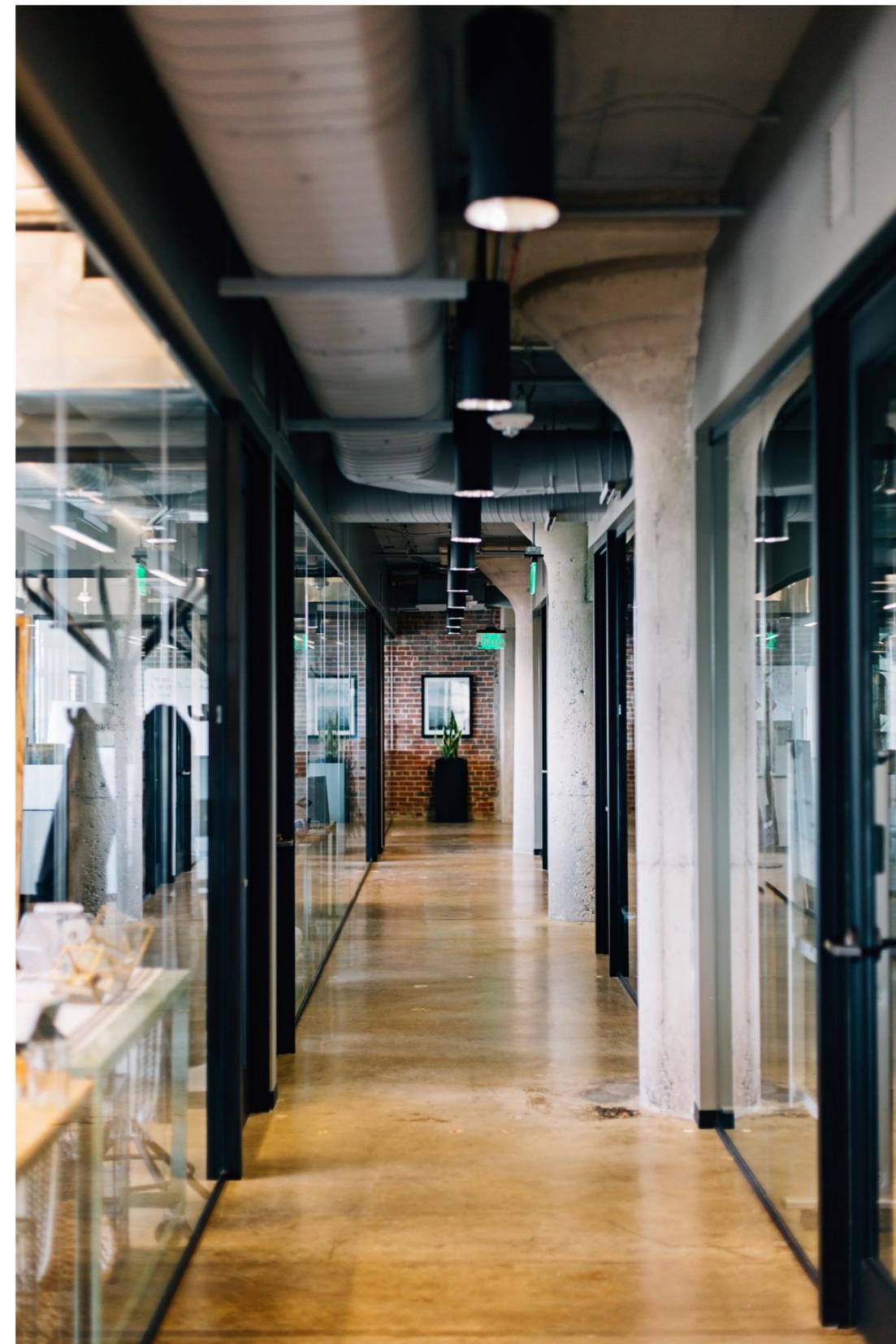
The workplace needs to offer more in order to tempt employees to return.

Technology decision making has been democratised with more potential stakeholders



"We all know that work will never be the same, even if we don't yet know the ways in which it will be different"

- Slack CEO, Stewart Butterfield



The Workplace Outlook

Version 2.1

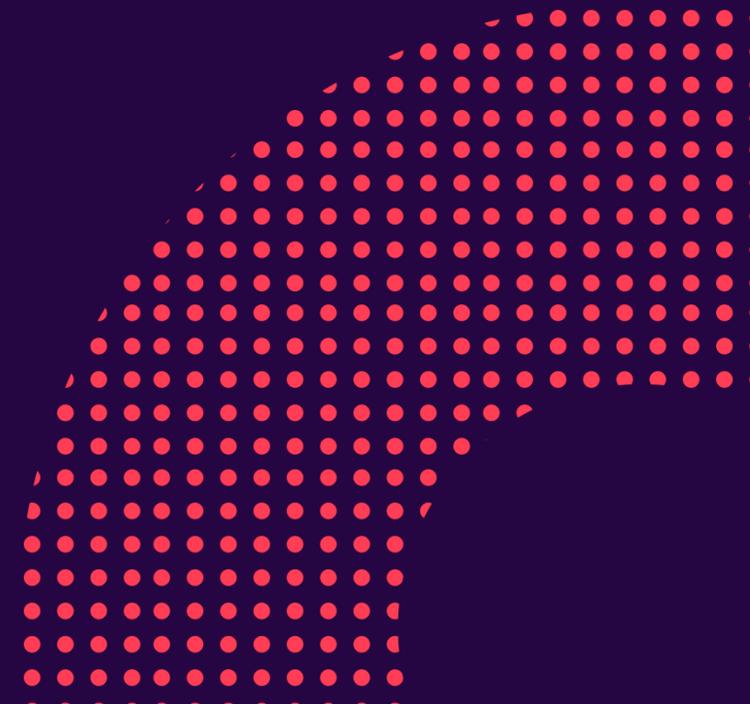
Whilst for most companies, the transition to remote work has gone more smoothly than they may have feared, this relies primarily on relationships and frameworks built in Office v1.0. How new hires become integrated and knowledge is institutionalised will be a further test.

The hybrid model

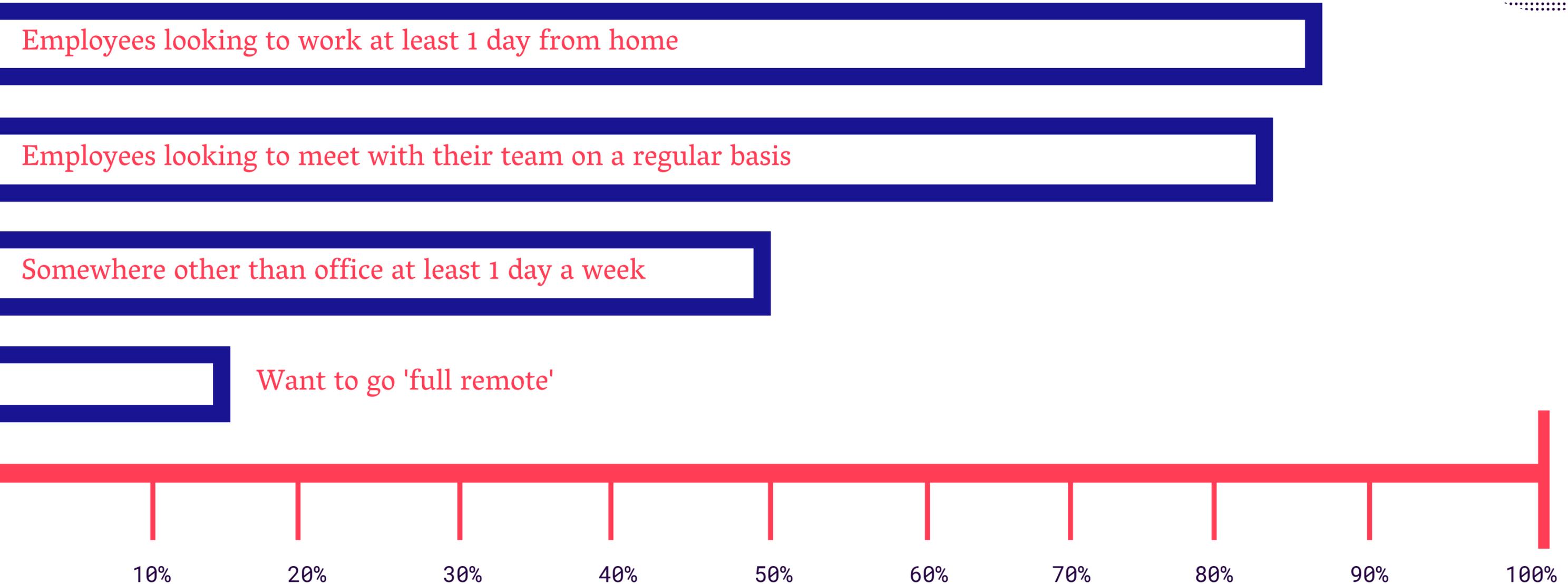
Surveys conducted by Cleverly and others indicate that the days of 'all or none' are most likely gone. Employees have taken to remote working and few companies have complained of negative impact on productivity.

Workplace-making

The workplace will need to offer things that home working cannot. This may be commercial grade equipment, enhanced health & wellness or stimulating and productive environments that make it worth going into the workplace.



Where do employees want to work from?



Source: HubbleHQ

Technology

Zoom, Teams and Google Meet are just the beginning but indicate how much will change. With technologies such as robotic process automation, AI/ML and 3D printing (additive manufacturing) becoming more capable and commonplace, the world of work is going to change considerably.

Social Forces

Changes in the workplace cannot happen independent of changes in society. As workforces become more diverse, required skills change and inclusiveness and equality increase in importance, workplaces will need to change as well.

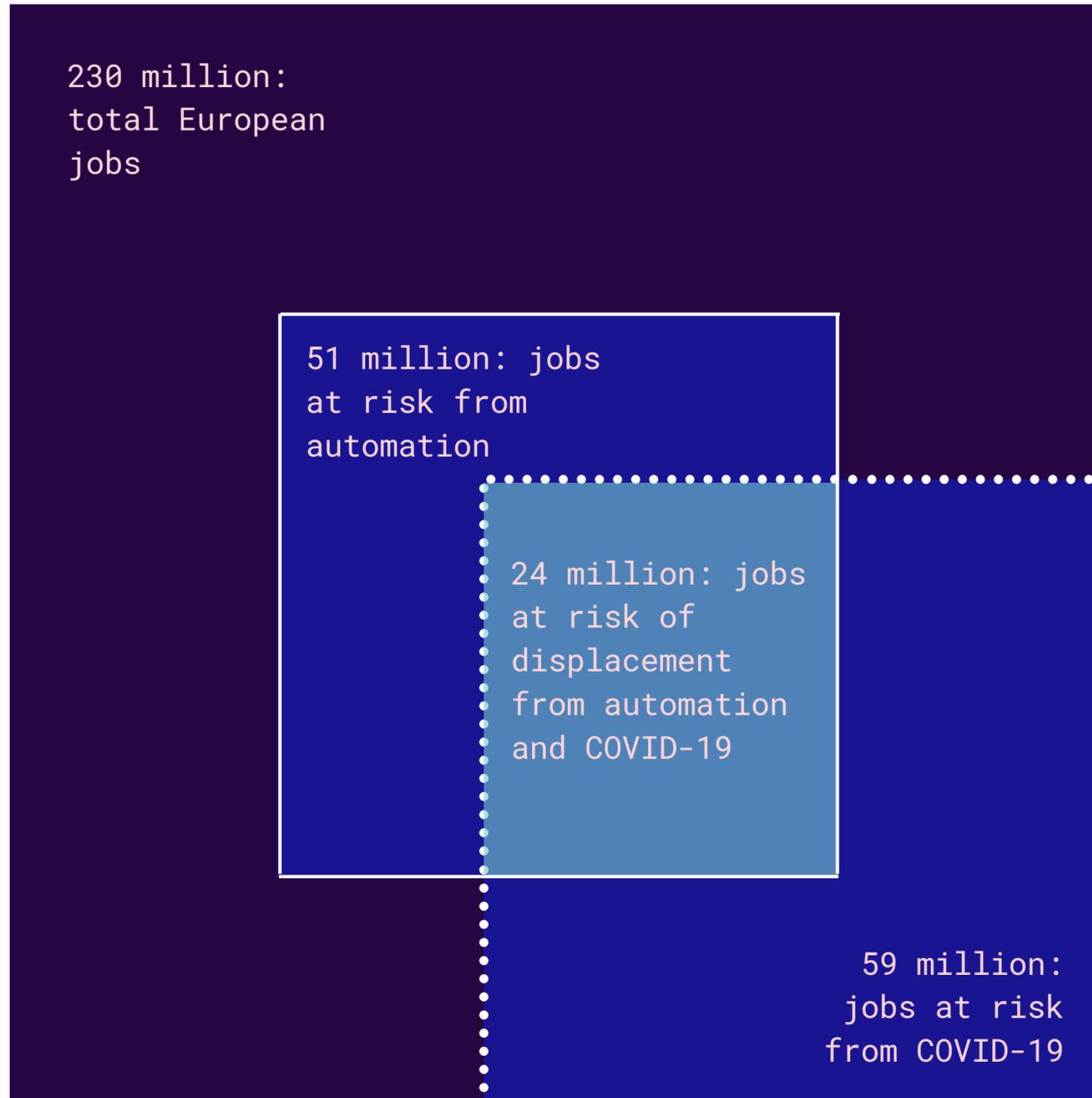
Location & Transport

Data suggest that the move away from urban centres had started to occur prior to the global pandemic, but the global megatrend of increasing urbanisation continues. In both cases, the availability and nature of transport is going to have an outsized impact on both the location and nature of workplaces.

Reasons for Change



Technology



Source: McKinsey

Pandemic vs 'Progress'

The impact of technological change on the workforce will be almost the same in scale as that of COVID-19, albeit playing out over a longer time period.

Impact of Change

Digital Transformation

What are companies' goals in adopting more technology into the workplace and how can they futureproof their systems?





Technology

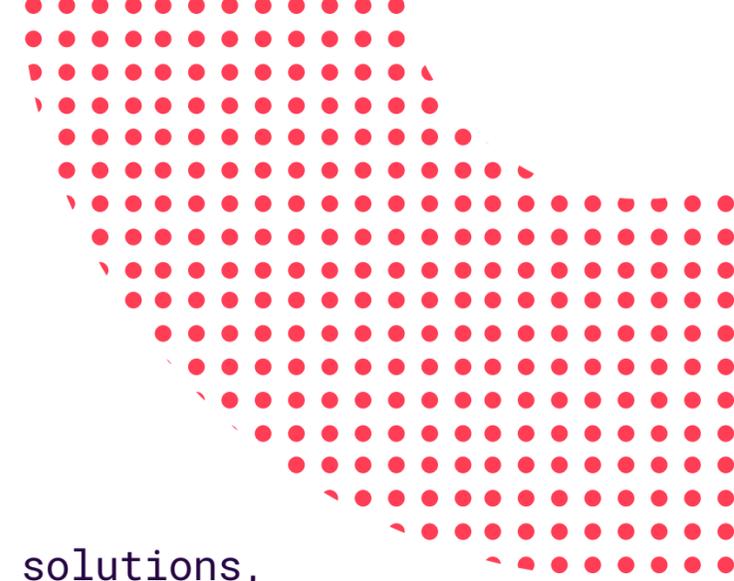
In Tech We Trust?

As companies look to futureproof their technology solutions, they need to be clear about their goals and reasons for investing in digital transformation.

Are they making investments to improve internal processes? Are they responding to client requirements?

By undertaking a digital journey, clients need to ensure that their system is going to be flexible and scalable. At a minimum, cloud-hosted SaaS solutions should be customer requirements.

Just as companies look to operate in a sustainable manner in other aspects of their business, their technology investment should be sustainable as well. A system that can adapt and expand is critical to future success.



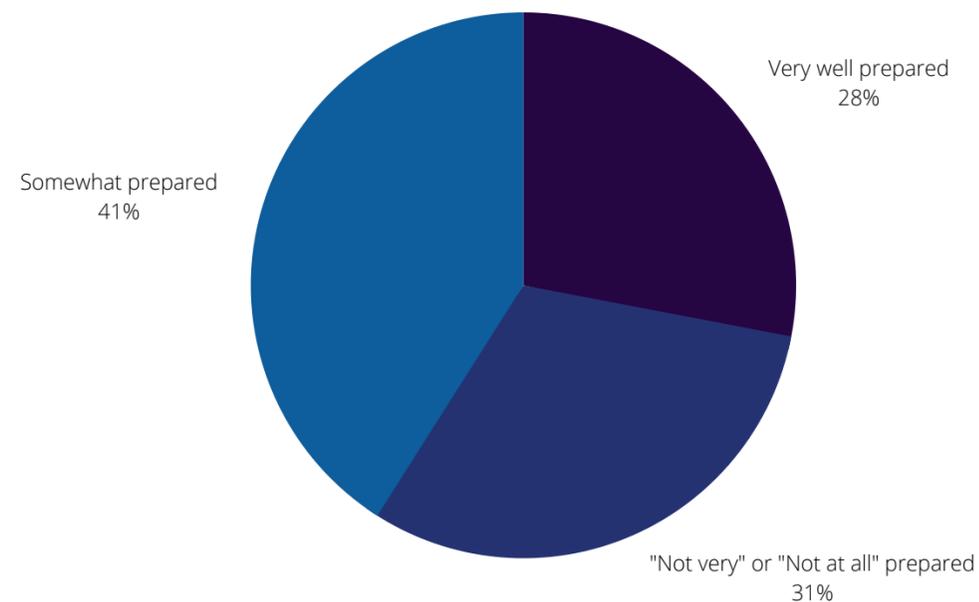
Technology

Most businesses were unprepared

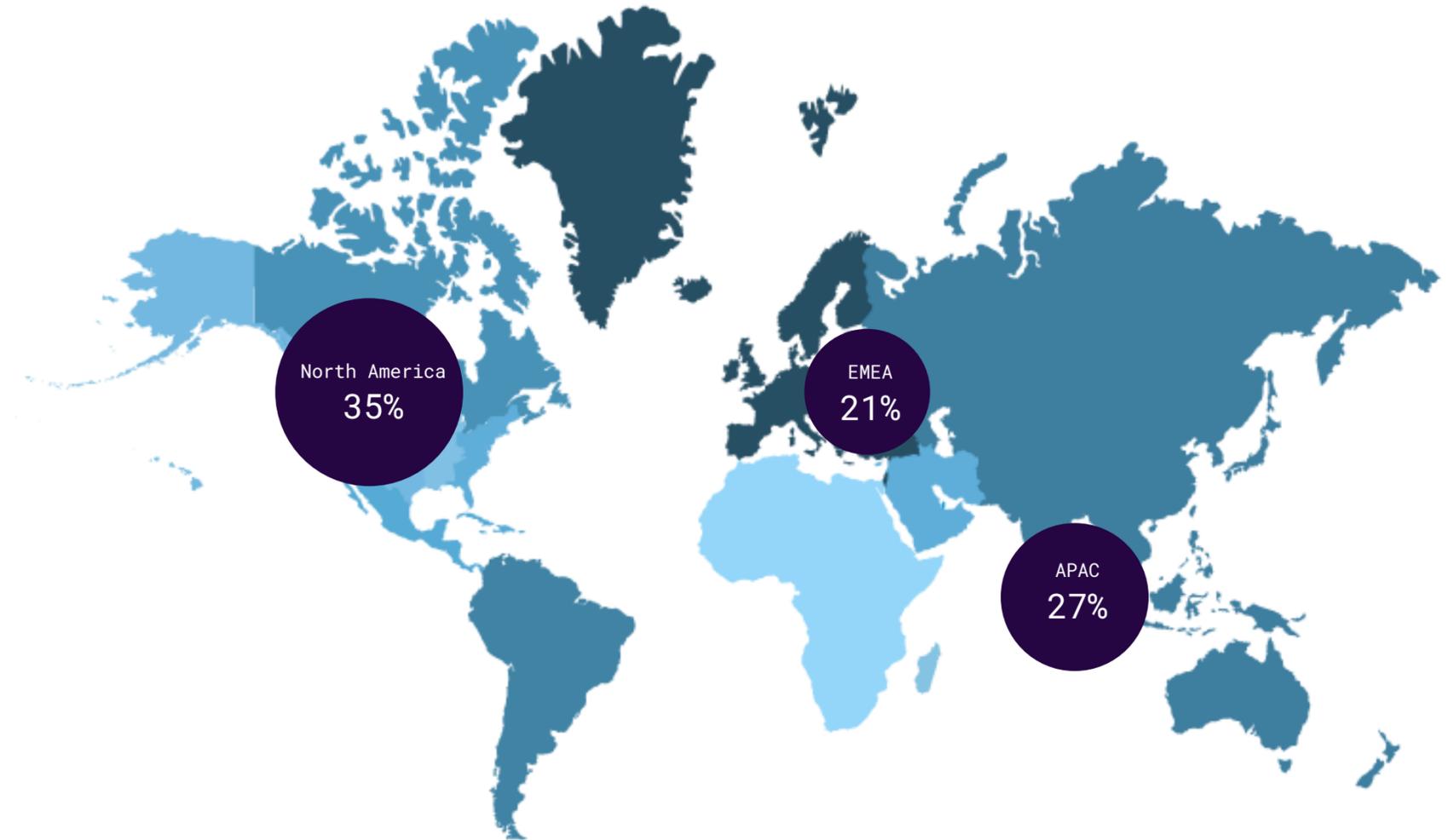
The pandemic has often been characterised as accelerating digital transformations that would otherwise have taken 5 - 10 years. It is therefore not surprising that many companies found themselves unprepared for what COVID-19 required of them.

According to PEGA:

Only 28% of respondents said their companies were "very well prepared" to deal with the COVID-19 pandemic. One third said they were "not very" or "not at all" prepared.



Where were businesses most prepared



Technology

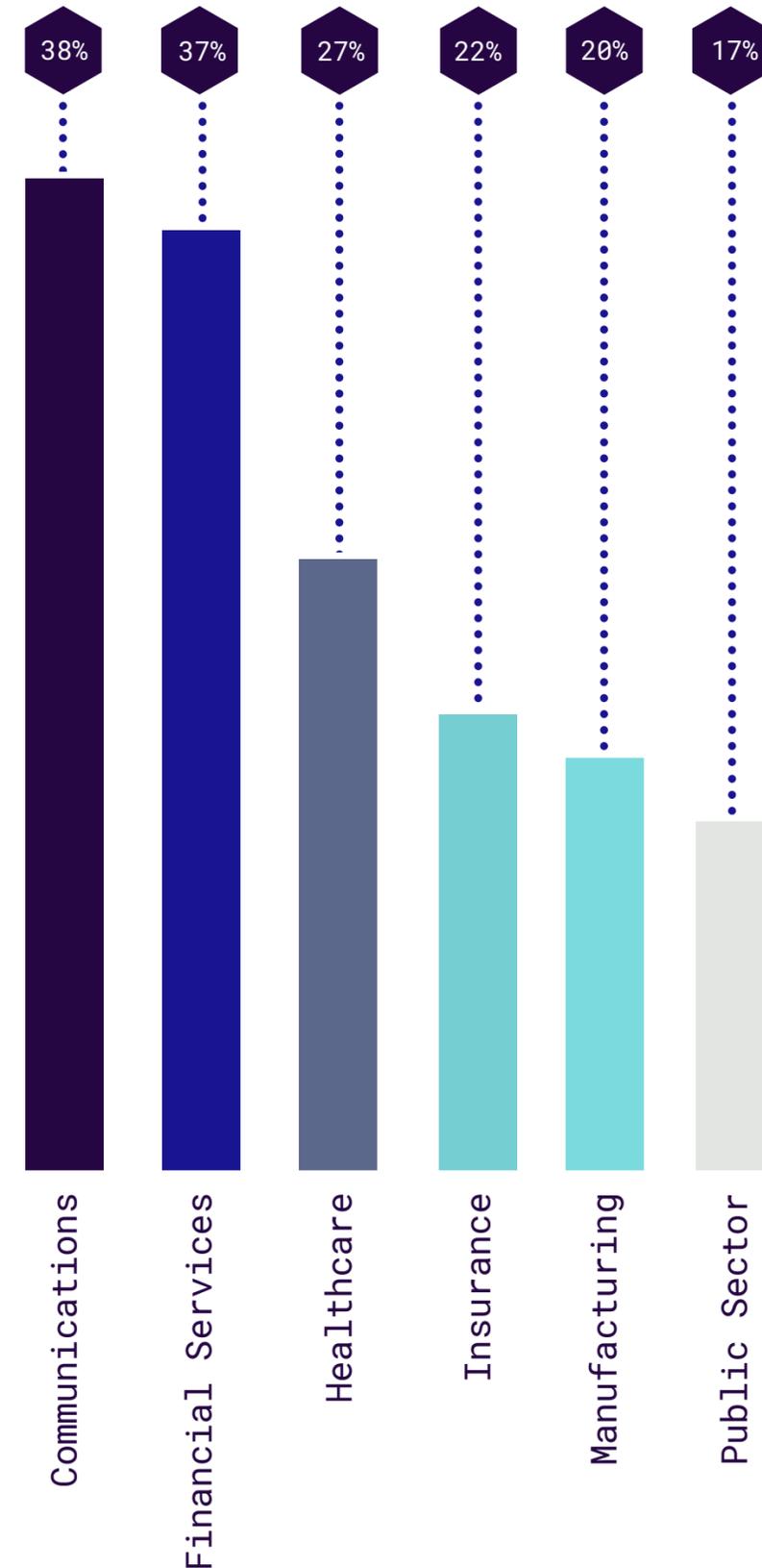
... but some more than others

Whilst the majority of companies only found themselves somewhat (or less) prepared for the sort of change that COVID-19 could bring, this differed from one industry to the next.

Perhaps not surprisingly, those involved in physical industry - such as the manufacturing sector - was less able to adapt. Perhaps because of its scale, and constrained resources, the public sector also has suffered. Whilst we are heartened by the comments below, we do urge our clients to prepare for the next rather than the last crisis.

"Preparing for future crises now tops the agenda for governments and businesses. 84% said 'improving preparedness against any future or similar pandemics is a high priority for their organisations"

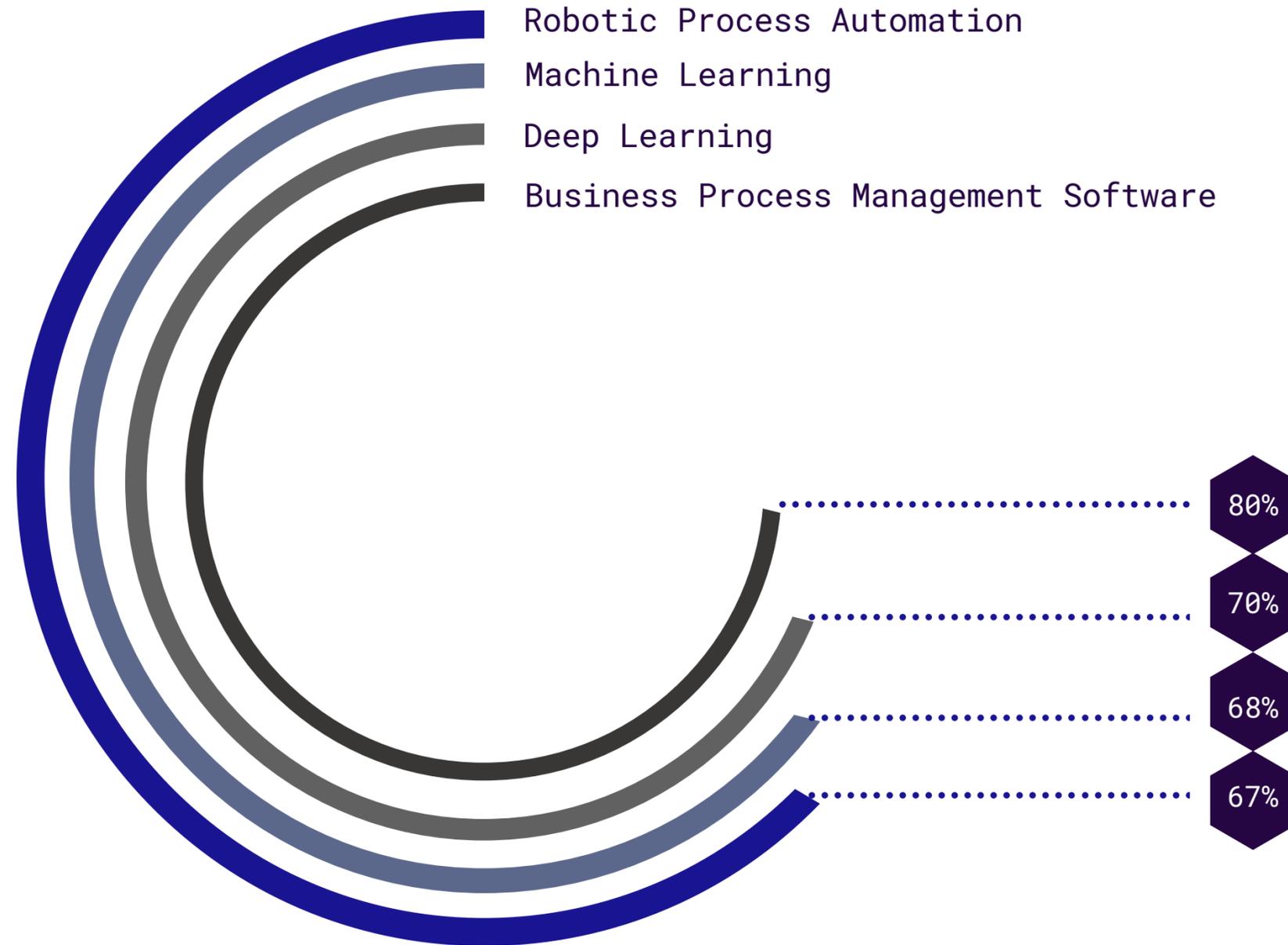
Source: Gartner



Technology

Where are companies allocating their resources

With the need to adapt to the changing technological environment; to ensure they remain and competitive and to improve the efficiency of their workforce companies are investing in the following areas according to consulting firm pwc:

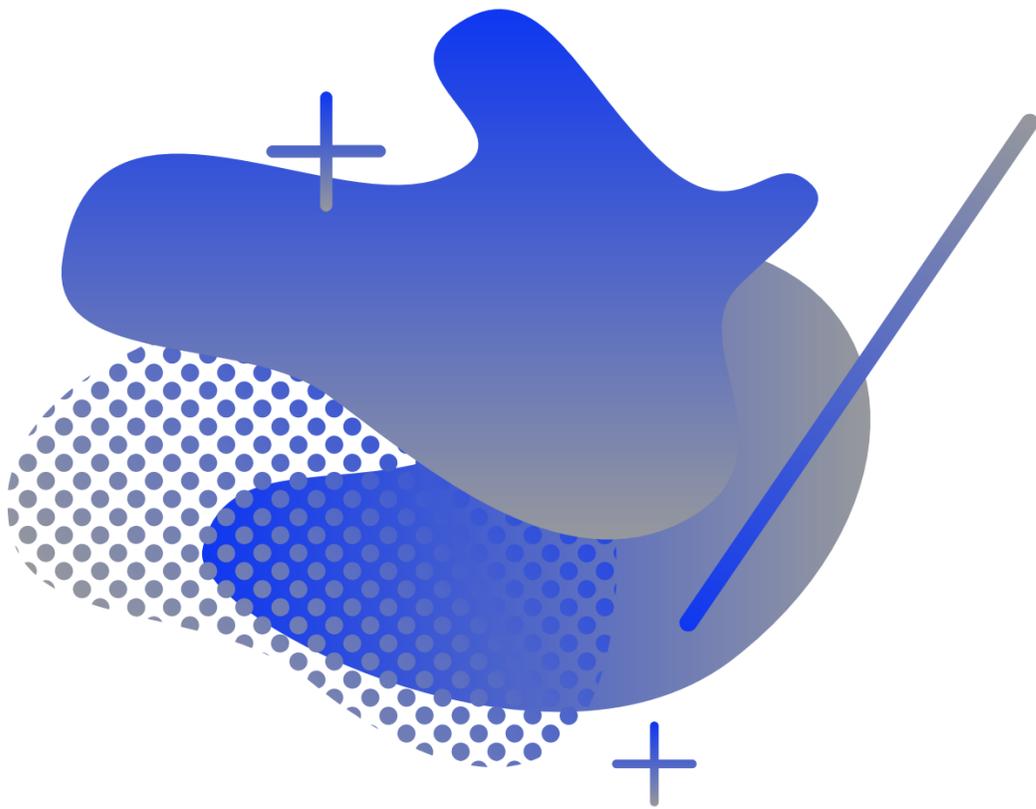


"90% of C-Suite executives believe their company pays attention to people's needs when introducing new technology, but only half (53%) of staff say the same"

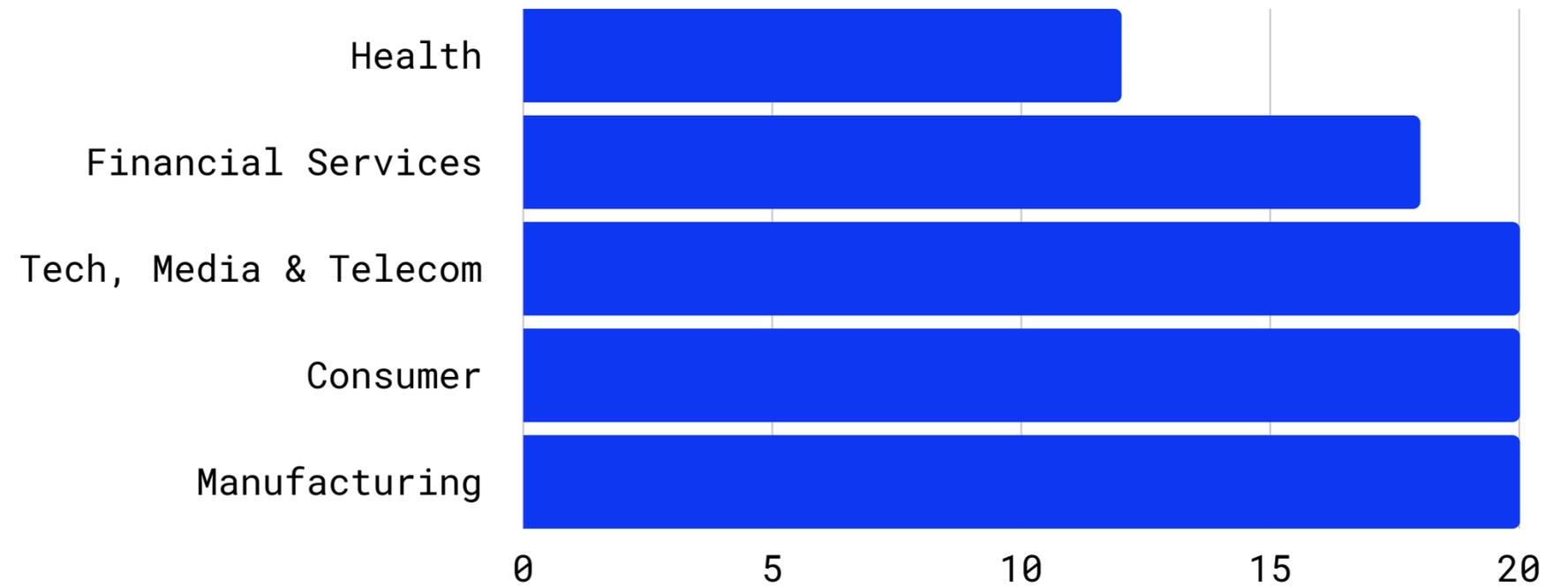
Technology

Employees want digital skills

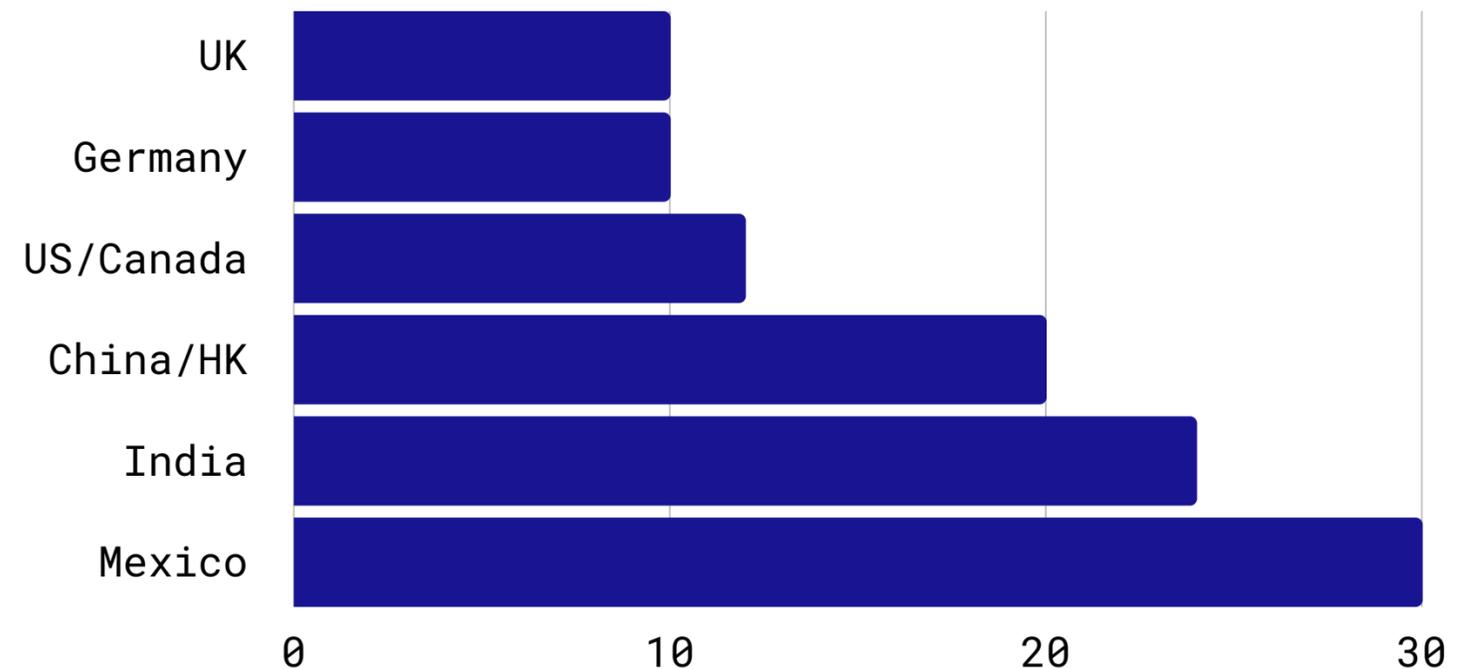
Employees have also confirmed that they are curious about technology and are willing to invest their time in ensuring their skills stay relevant. A system that allows the workforce to explore their curiosity is most likely to get the buy in of employees.



Hours employees are willing to invest by Sector



... by Country



Location & Transport



Mobility can solve the matching problem

With declines in certain types of jobs, mobility is going to become increasingly important. McKinsey estimate that up to 40% of Europeans will be living in regions with shrinking labor markets.

They further estimate that even megacities and hubs will only have 60% of the labour force that they require for their own expanding. The answers to these problems will be found in increasing the mobility of labour

Get in touch

Want to talk workplaces, workflows and all things automation. Get in touch with Cleverly

contact@cleverly.works

