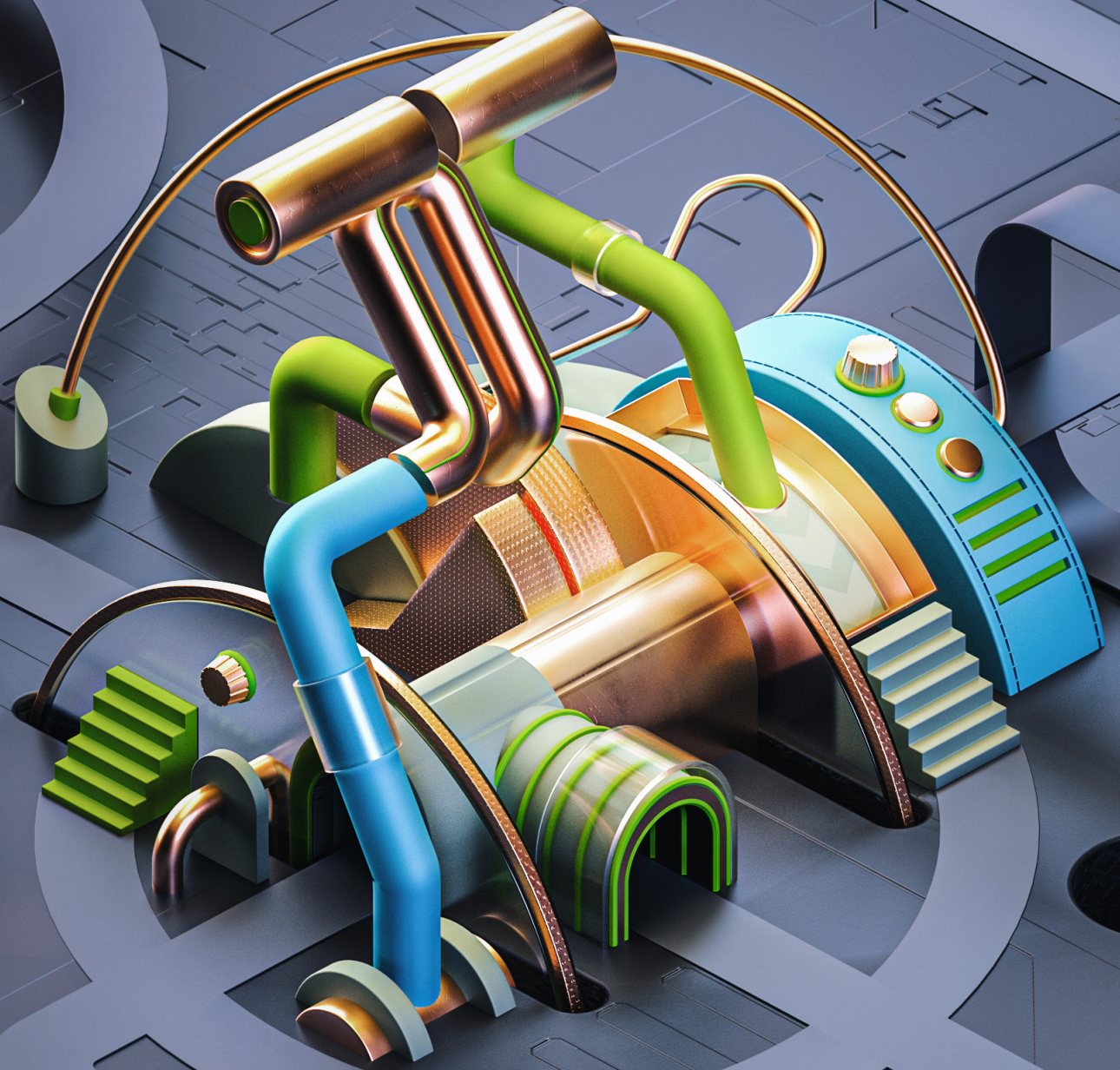


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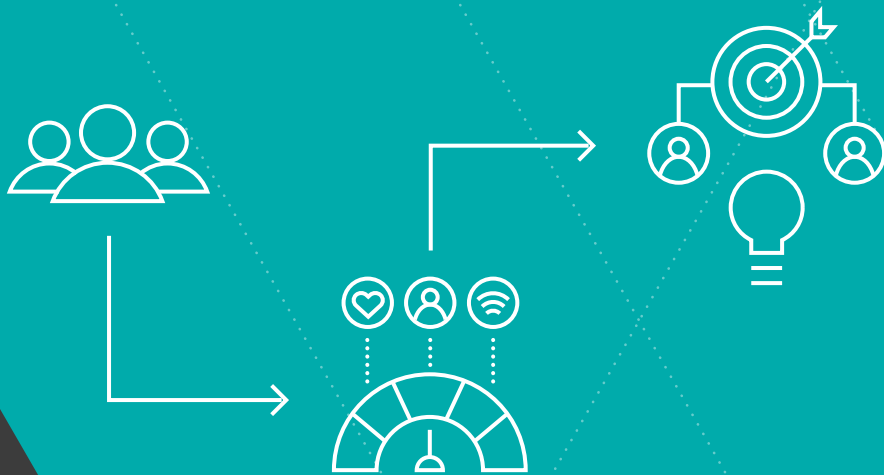
Tech Trends 2021



Rebooting the digital workplace

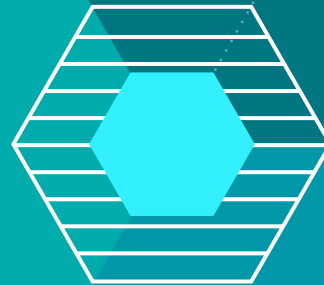
MEASURE AND MANAGE

The digital workplace's technologies and tools can help employers gain insights that enable them to identify patterns, make predictions, nudge behaviors, and fine-tune performance.



WORK IN NEW WAYS

Data and insights from the digital workplace can help organizations improve work processes and employee experience to create better outcomes.



OFFICE OF THE FUTURE

As the office becomes a hub for collaborating, innovating, and meeting, digital technologies can augment the onsite work experience.



TREND 7

Rebooting the digital workplace

Data can drive new ways of working remotely and in the office

Driven by COVID-19, the abrupt shift to remote work as the default for much of the labor force has altered work as we know it. One study found that only 15% of those employed pre-COVID-19 worked from home; these workers were joined after the pandemic by an additional 35%, suggesting that fully half of the employed labor force now works from home.¹

With the work-from-home cat out of the bag, it could prove challenging to coax these professionals back to prepandemic levels of in-office work. Staffing firm Robert Half found that 60% of professionals who had transitioned to a remote setup said they have better work/life balance, and that 74% of respondents would like to continue to

telecommute more after pandemic restrictions are eased.²

As organizations manage a growing number of offsite employees—working from home or other nontraditional workspaces—many are beginning to accept the inevitability of a digital workplace where work is completed by a mix of onsite and remote workers that must operate in synchrony to meet business objectives. Some leaders approach the prospect of the digital workplace with a number of concerns:

- **Productivity.** Distractions and poor supervision could impede collaboration and derail productivity, and the lack of social support might lead to high employee dissatisfaction and turnover.

- **Relationship building and onboarding.** Strong existing relationships typically remain so after a remote work transition, but weak ones often erode. And it can be challenging to virtually cultivate new relationships and onboard new employees.
- **Development and learning.** It could be difficult for workers to virtually develop and maintain skills and professional networks they need to advance.
- **Impact on innovation.** The loss of serendipity—the unexpected and opportune employee interactions that fuel exploration and invention—could have a long-term negative impact on innovation.



Companies may be able to overcome the digital workplace's deficits and ambiguities by more intentionally embracing its positive aspects, including the data generated by workers' tools and platforms. This can help organizations optimize individual and team performance and customize the employee experience through personalized recommendations, enabling remote work to be far more than a diminished proxy for the traditional office. And as onsite workspaces and headquarters evolve, organizations can use this data to create thriving, productive, and cost-effective offices that are seamlessly interwoven with the remote experience.

The digital workplace is more measurable and manageable

If it's true that you can't manage what you don't measure, then the digital workplace is eminently manageable. Its technologies and

tools can help employers gain insights ranging from individual employee performance to team-level productivity to companywide morale, enabling them to identify patterns and make predictions, nudge positive employee behaviors, and fine-tune individual, team, and organizational performance.

Enabling technologies include people analytics solutions that help deliver actionable insights on employee and team behavior and productivity, AI-driven personal productivity assistants and other artificial intelligence (AI) technologies that use workforce data to make personalized recommendations to optimize performance, and workflow management solutions that streamline work processes and automate decision-making, actions, and responses.

On the backend are strong cybersecurity solutions, such as zero trust architectures (as discussed in the chapter [Zero trust: Never trust, always verify](#)), along with hybrid and multicloud

environments and services that support secure remote access and scale with flexing workloads. Of Deloitte's own experience in rapidly enabling its workforce, unified communications infrastructure lead Aaron Roe notes that previous infrastructure upgrades proved their value. "Because we had already moved to cloud-based unified communications, we were able to migrate the entire firm to remote work in less than four days without overloading our data centers," he says. "And our move to a zero trust security model allowed employees to securely access needed resources without using a VPN."³

On top of these foundational technologies, organizations can layer tools such as organizational network analysis, which is currently used to track organizational information flow. Such analysis can help gauge remote workforce connectivity—for example, identifying isolated employees and measuring interactions between and among teams.



Workplace social media can help teams tap into the power of the entire workforce, regardless of location, to generate ideas and collaborate, democratizing formerly privileged exchanges of ideas. And with research demonstrating that videoconferencing's traditional grid of boxes taxes people's brains and causes fatigue,⁴ new videoconferencing solutions based on virtual and augmented reality stand ready to enable persistent, simulated collaboration environments—such as those found in online video games—where users can meet, communicate, interact, and collaborate in a more natural-feeling setting.⁵

Finally, with collaboration tools now ubiquitous, a collaboration ecosystem strategy can help optimize technology investments in chat-based workspaces, video and phone conferencing, individual and team project and task management, whiteboarding and brainstorming, file-sharing and storage, and other tools. This can help enterprises curate

these collaboration tools and seamlessly integrate, architect, and use them in a coordinated manner to reduce confusing or repetitive workflows and alerts. Not only can this improve team productivity—it can improve the quality of data and insights that help leaders better understand and manage their employees.

Measuring employees' digital activity provides an additional opportunity for employers to lean into the ongoing move away from decision-making based on gut instinct and assumptions. Transparency about how they plan to use the data—and what they're measuring and why—can help organizations manage privacy concerns. And rather than focus on individual performance, they can aim to identify and bend overarching trendlines by aggregating and anonymizing data.

The next-level ability to measure and manage will drive new ways of working

The transition to the digital workplace could follow a path reminiscent of the evolution from analog LPs to digital CDs and, later, to MP3s and streaming services, which ushered in measurability, portability, scalability, and countless other benefits. The resulting data enabled services to suggest songs and artists to users based on previous listening habits, creating a better and more tailored fan experience.

Similarly, by understanding data and behaviors that most closely correlate with workplace success and failure, companies stand to improve work processes and create personalized employee experiences that create better engagement *and* outcomes.



The most agile companies will investigate the patterns remote workers are encoding in data and use them to develop new ways of working. As ways of working and collaborating are standardized, the knowledge that can be extracted from emerging work patterns will become more precise and more valuable.

If it's true that you can't manage what you don't measure, then the digital workplace is eminently manageable.

Employee engagement and well-being.

In a remote situation, managers may be unable to readily identify employees who are at risk for low productivity or in danger of leaving. With data generated by the digital

workplace, managers can identify employees suffering from emotional stress and burnout and proactively intervene to address such challenges as low engagement and lack of inclusivity.⁶ Psychographic data such as boredom, stress, and fatigue levels can help leaders better allocate tasks and ensure that employees are appropriately challenged and empowered to manage their career goals and be productive while avoiding burnout.

Flexible workplace 2.0. Digitization unlocks a new era of workplace customization. In the same way that streaming music services offer individual users customized, data-driven experiences based on personal tastes, remote workforce data and predictive analytics can help organizations provide employees with high-quality, customized experiences—a mix of benefits, rewards, assignments, and learning based on personal experiences and tacit and explicit preferences. The digital coach of the future—enabled by organizational AI—

could offer employees assignments predicted to be both interesting and skills-aligned. The coach “knows” the skills and experiences that each employee needs to be optimally challenged and makes suggestions to improve behavior, collaboration, and specialized skills in real time.

Digital serendipity. Data generated by collaboration channels can map worker interactions and relationships, revealing informal structures that are often more influential than formal organizational design. It could identify workplace relationships that could be proactively developed or strengthened to foster serendipitous, cross-disciplinary connections that help drive innovation. Virtual connection-building tools can nudge contacts between individuals and teams, make customized recommendations to link employees with mentors and like-minded colleagues, and support onboarding by connecting new hires with teammates



and peers. Gig platforms, or internal talent marketplaces, can help connect employees with internal and external opportunities, mentorships, stretch assignments, and rotation programs and enable managers to find needed skills.

The office is dead, long live the office!

While the office may be undergoing a pandemic-driven existential crisis, it's not down for the count. (The everyday commute, on the other hand, appears to be on life support.) However, just as e-commerce changed the way consumers and retailers think about brick-and-mortar storefronts, so is the forced mass adoption of remote work changing the way employers and employees think about the physical workplace.

For example, even though employees desire the flexibility to work remotely, most aren't ready for an online HQ. In one survey, nearly three-quarters of workers said they prefer a balance of working at home and in the office.⁷ The primary draw of the office, according to another study, is face-to-face human connection,⁸ particularly for millennials and Gen Z workers.⁹

While the office may be undergoing a pandemic-driven existential crisis, it's not down for the count.

How do we reconcile these competing needs? The office may not be dead, but it's unlikely to return in its previous incarnation. Employers

could find that creating exciting environments that employees are eager to experience is the best way to entice them back to the office. Perhaps, as architecture and design firm Gensler predicts, the post-COVID-19 workplace will shift from a place where people work to a place where teams meet, socialize, and connect.¹⁰

The smart money is on flexible and configurable work environments, technology-driven workplace services, and new ways of managing fewer people and less space without sacrificing collaboration and innovation. As the office evolves to become both a collaboration hub for project teams and a creative center for client meetings, employees can expect a hybrid work style that supplements working from home with targeted in-office experiences, especially for critical events such as onboarding. And while coworking spaces took an immediate occupancy hit when COVID-19 first struck, in

the long term, they could be a more flexible, less expensive office alternative for businesses that are canceling or renegotiating their leases.

Offices of the future will likely be infused with the same digital technologies and tools used in the remote workspace. The same capabilities that enable a personalized employee experience in the digital workplace can similarly augment the physical workplace experience.

The office will likely be retooled to more easily permit virtual, multidirectional collaboration with remote workers. For example, in Deloitte offices, all conference rooms, phone rooms, and other closed-door meeting spaces will be enabled for video with platform-agnostic videoconferencing solutions that integrate all leading applications. Teams are exploring how technologies can create parity of experience between people meeting in the office and remote participants. Deloitte's boardroom, featuring individual cameras with advanced

optics and noise-canceling microphones at each seat to provide remote attendees with a more realistic experience, serves as a model for how such parity might be achieved.

Organizational AI can help teams organize the dates, times, and locations of in-office meetings to maximize the value of space and promote team interactions. And with good office design, companies can measure the impact of traditional office orthodoxies such as in-person conversations, water-cooler discussions, and spontaneous hallway encounters that generate real business value. Yet the return on investment for the office of the future will likely be more carefully examined than it has in the past.

The way forward

In the wake of the mass forced adoption of remote work, many organizations are

considering how to configure and manage a digital workplace in which work is completed by both remote and onsite workers. The data generated by workers' tools and platforms can help organizations fine-tune individual productivity and team performance, deliver customized employee experiences, and optimize the use of office space. As employees return to the office, this data can also help remote and onsite teams work in concert and ensure the parity of remote and in-office employee experiences.

LESSONS FROM THE FRONT LINES

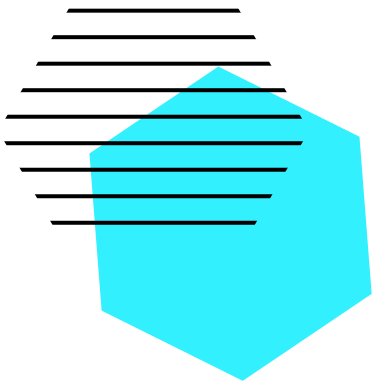
New tools, good timing support remote work rollout

New tools and good timing helped Thomson Reuters navigate the pandemic-driven shift to remote work, says Rob Newnes-Smith, CTO of digital, employees, and partners for the business information services and global media company.¹¹ When the majority of its 25,000 employees began working from their homes in March 2020, Thomson Reuters was putting the finishing touches on a major global rollout of cloud-based enterprise systems and platforms, including collaboration and productivity tools that made it easier for employees to quickly adapt to remote workflows and maintain productivity.

A significant portion of Thomson Reuters employees were accustomed to periodic virtual work, but these previous experiences provided only partial insights into the impact of long-term remote work and lockdown isolation on well-being, especially when other factors such as home-schooling and care for elderly relatives were in play. Company leaders recognized the importance of extending the corporate culture

to the home workplace. The use of videoconferencing tools became the norm for daily meetings while the use of desk phones faded. In many cultures, a deep-rooted sense of formality toward behavior in the work environment made some employees feel awkward about the casualness of working from home. Team leads cultivated authenticity and compassion by modeling more relaxed attire and the use of home areas not typically seen as office space, with perceived erosion of boundaries such as videoconference interruptions by children or pets.

Having successfully enabled its employees to be productive in the remote work environment, Thomson Reuters is working to define the postpandemic workplace experience. Its well-timed modernization of enterprise systems puts the company in a good position to adapt to “the next normal” with access to personalized, consumable information, improved use of automation and AI to complement self-service functionality, and richer levels of insights available for the executive leadership team. Newnes-Smith envisions employees routinely dividing their time between regional hubs and their home offices so that they can enjoy the best of both worlds: face-to-face collaboration, socializing, and unplanned





interactions along with the flexibility of telecommuting to create an improved work/life balance.

Moving forward, the Thomson Reuters HR, real estate, and technology teams are deliberately reenvisioning in-office technologies, including integrated communication and collaboration platforms, new tools such as smart whiteboard technology, idea management software to crowdsource innovative ideas from employees, predictive talent insights, automation of key talent acquisition base processes, and AI-based tooling as part of a new learning system platform. “We plan to leverage our collaboration platforms to create a frictionless, seamless experience as employees move between their chosen places of work,” he says.

Ensuring equity between in-office and at-home work experiences is critical. As we move into the ninth month of COVID-19, Thomson

Reuters continues to hone its use of various collaboration tools to ensure employees’ voices are heard and faces are seen. “When everyone is an equal square on a screen,” Newnes-Smith says, “it has a way of leveling the interaction, whether you’re located at home, in an airport, or in the office.”

Lloyd’s of London accelerates innovation with virtual underwriting room

When the COVID-19 pandemic hit the United Kingdom, Lloyd’s of London—the renowned commercial insurance marketplace that intermediates between clients, underwriters, brokers, and insurance companies—closed its market floor, known as the underwriting room. From their hastily set up home offices, brokers and underwriters transitioned from in-person deal-making to electronic trading.

It was a dramatic change for participants in the insurance market, which had never in its 330-year history halted in-person trading.¹² Traditionally, the four-story underwriting room is a bustling trading hub packed with insurance brokers and underwriters who conduct face-to-face meetings to negotiate deals between policy buyers and sellers. On a usual day, the underwriting room hosts about 5,000 market participants; around 45,000 people have badges to enter. “Historically, the market floor is the heart of Lloyd’s. Business is grounded in the physical space, where brokers walk the market floor and wait in queues to see which underwriters are at their booths and whether they might be interested in insuring a particular risk,” says product owner Sam Irving. “COVID-19 was a monumental event because it completely disrupted these well-established workflows.”¹³

As Lloyd’s worked toward a phased September reopening, leaders looked to leverage digital

technologies to make connecting more operationally resilient, instead of simply returning to business-as-usual in the physical underwriting room. “This wasn’t a completely new idea for us, but the pandemic’s challenge to the old ways of working really accelerated our thinking,” Irving says.

Leaders decided to develop a virtual underwriting room that would complement Lloyd’s’ in-person counterpart. This meant identifying gaps in the existing electronic trading experience, such as the ability to schedule on-the-fly meetings, ask and answer quick questions, and meet spontaneously—the hallmarks of the market floor. The goal was not only to improve the current work-from-home experience but to leverage those learnings to improve the traditional in-person trading process.

On an accelerated timeline—and backed by an extensive research and design process

that centered the needs of brokers and underwriters—Lloyd’s established a virtual room that connects brokers and underwriters via digital collaboration platforms, enabling them to schedule trading conversations with colleagues in different locations around the world. The virtual room includes searchable broker and underwriter profiles and a market directory, availability settings, and flexible chat functionality. This allows brokers to search for underwriters by specialty, view underwriter profiles, see who’s free for an immediate chat, and schedule meetings or videoconferences. The market directory and profiles help underwriters promote themselves by providing more visibility into the types of opportunities they’re seeking.

Lloyd’s unveiled its virtual underwriting room to selected users in tandem with the September reopening of the market floor. The goal is for the virtual and physical rooms to work in synergy and provide equally efficient

and supportive experiences whether the user is trading remotely or on the market floor. For example, the market directory improves the efficiency of brokers in the physical underwriting room by enabling them to check underwriters’ availability without walking around the market floor, and as market profiles develop, this could help brokers confirm underwriter interest in potential deals without standing in queue.

An unintended benefit of the virtual room is that publishing users’ availability can aid their work/life balance. “Working from home removed the traditional end-of-the-day boundary of physically leaving the market floor and going home, and people routinely contacted each other on their mobile phones during nonwork hours,” Irving explains. “Setting their availability gives remote users more control over developing and maintaining work/life boundaries.”

Lloyd's continues to build on the initial launch of the virtual underwriting room, adding and improving features and releasing improvements weekly. Top priorities for the future include virtual queuing, integrated calendars, and mobile applications.

Human-centric technology critical to workplace redesign and workforce performance

COVID-19 has made a permanent imprint on the way workplaces operate, forever changing how people work—and where they work. Many business leaders are trying to determine how these new ways of working will affect their organizations—and their real estate portfolios. Commercial real estate services company JLL, which has long tracked trends in workplace strategies, design, and

technologies, expects the road to the “next normal” to be fluid and complex.

COVID-19 has accelerated the transformation of the workplace by five to 10 years, says Marie Puybaraud, JLL's global head of corporate research, who specializes in the study of human performance and the human experience at work.¹⁴ “The distributed workforce that we’re seeing now was always going to happen, but we were expecting a slower evolution,” she says. “The pandemic simply sped up the timeline.”

JLL's research shows that high-performing workers have flexible work hours and remote work opportunities—but that during lockdowns, these high performers missed being in the office more than others. “While remote work seems to have a positive effect on performance, workers are not ready to abandon the office, because collaboration with colleagues and the ability to manage or

feel supported waned during the pandemic,” Puybaraud says. “Therefore, we don't expect office environments to retain traditional designs. We have a flexible workforce, and we will need workplaces to be equally adaptable.”

For example, instead of a single corporate HQ, a business might have multiple smaller offices that are geographically distributed to maximize available talent pools, with employees dividing their time between home, corporate offices, and other co-working places. Puybaraud sees this as the New Golden Age of the Worker—and sees a worker-centric approach as critical in redesigning these workplaces.

Nearly half of workers who participated in a recent JLL survey say they desire offices with dedicated areas for socializing, connecting to nature, and learning, as well as doing focused work. Typically, however, about two-thirds of space in today's office environments is reserved for individual work, with only around

a third set aside for collaborative purposes. To meet the needs of the future workforce, these proportions likely will need to flip, with roughly three-quarters of the workspace for collective use and the rest set aside for individual work.

This likely will require businesses to significantly retool and redesign their office environments to meet workforce preferences and reenvision the workplace as a social hub to boost human experience and performance. JLL is exploring how artificial intelligence, virtual and artificial reality, 3D modeling, and other technologies can help push the built environment beyond its current limits. Besides transforming the physical workspace, technology can enable the dispersed workforce to collaborate and innovate effectively. For example, future technology platforms need to enable those who aren't physically present in future collaboration spaces to interact naturally and productively with those who are.

The success of the mass work-from-home experiment conclusively proved the value of technology, Puybaraud says. "Technology established itself as a successful enabler of remote work. By and large, businesses were able to continue to operate efficiently because of technology platforms. However, with employees dispersed among multiple office locations and home offices, companies will probably need to expand those platforms as we move forward. There is a lot of opportunity for new solutions that deliver more realistic, engaging, human-centric experiences. While nothing can replace the real-world interactions that most people crave, technology can make interactions between on-site and remote colleagues even more efficient."

MY TAKE

Dan Torunian

Vice president, employee technology and experiences and data centers, PayPal



When COVID-19 caused PayPal to move our 23,000-plus employees from 90 onsite locations to a work-from-home model, our emphasis evolved from ensuring their safety to improving efficiency.

But as it became clear that the workforce would remain offsite for the foreseeable future, we shifted our focus, using the rapid move to remote work as an opportunity to reexamine the ways we work together in teams and as a company.

To achieve our business goals and continue to provide a world-class experience to all employees—whether onsite or offsite—we are developing new ways of working and collaborating. Our goal is to enable the workforce to be productive in terms of velocity and output while also promoting learning, innovation, and collaboration. And we want to help employees address some of the fundamentally human

challenges of working away from the corporate office.

Before the pandemic, work processes, collaboration tools, communication channels, learning opportunities, and culture—even the way we socialized with colleagues—were necessarily optimized for the traditional workplace. For example, about half of our employees work in operational roles in customer service, collection, and fraud. Before the pandemic, they worked in highly controlled, metrics-oriented call centers; their colleagues were all within arm's reach. COVID-19 required us to evaluate the sustainability of such traditionally designed teams. Now, these same employees are working solo—or with roommates, spouses, and children—in unstructured home-office environments. They're still meeting their productivity goals, but with new challenges related to communicating, collaborating, skill-building, and networking as well as such

inherently human challenges as sustaining social connections with colleagues, managing family members during work hours, and maintaining work/life balance. The digital workplace requires employers to reengineer the way their people connect, communicate, collaborate, and support each other within and across various functional areas.

With most or all employees operating from their homes, it's incumbent upon employers to optimize remote worker experiences, intentionally evolving them to be as efficient and delightful as onsite experiences are.

With most or all employees operating from their homes, it's incumbent upon employers to optimize remote worker experiences, intentionally evolving them to be as efficient and delightful as onsite experiences are. Moving forward, for example, we're looking for ways to tailor the digital collaboration process: We're exploring how to deliver the same capabilities and experiences across multiple collaboration platforms so that each employee can work with others using their preferred tools.

Employers can also identify and nurture local and regional working norms, differences in IT infrastructure, and technology preferences that could affect employee work styles and processes. For instance, bandwidth capacity, internet support, and network capabilities, along with cultural differences in attitudes toward working from home, vary among regions. Understanding and adapting to such factors can help companies

further differentiate and customize the employee experience.

It's also important to capture the natural feeling of tapping a colleague on the shoulder and spontaneously grabbing a coffee—a feeling that's missing from formal videoconference invitations. To help with this, we created an app that randomly pairs interested employees for virtual coffee breaks. We envision expanding it to create a virtual environment where users feel as though they're enjoying coffee together in their favorite café, instead of staring at a square on a screen.

The rapid move to remote work provided PayPal and other organizations with an unprecedented opportunity to reexamine people's ways of working. Ultimately, this will help our employees effectively meet business objectives and serve customers in more than 200 countries while enhancing the experience

of working from a corporate workspace, bedroom office, coffee shop, or hot desk.

EXECUTIVE PERSPECTIVES



STRATEGY // For many CEOs, this year's comprehensive shift to remote work remains top of mind. Leaders who are eager to improve the work experience can look to new digital tools that monitor online interactions to explore short-term improvements such as better collaboration as well as longer-term innovation. The virtual office also offers an opportunity for leaders to practice and promote radical transparency in communication. Still, CEOs should be highly purposeful in architecting their goals for remote work, as the choices they make can affect company culture well beyond the pandemic. They can either help employees feel more connected than ever to each other and to the company's vision or leave them feeling disconnected and alone in the new normal.



FINANCE // The challenges of the rapid-onset digital workplace continue to be top of mind throughout the C-suite and broader organization. CFOs should consider the potential financial impacts of these challenges, including the downsizing of large, urban offices into dynamic, smaller workspaces. But they should also anticipate potential costs of diminished productivity and creativity, as employees no longer congregate physically. In virtual settings, we often lose the ability to read social and facial cues, or to brainstorm during informal, water-cooler conversations. Finance leaders can lead differently in remote work by setting a strategy to address some of these gaps in the new workplace—for example, they can implement AI tools to analyze meetings in real time and nudge decision-makers to solicit opinions from quieter participants.¹⁵ Whether or not companies adopt such technology measures, people will look to CFOs to find ways to support employees' well-being and their ability to deliver outcomes that sustain the company.



RISK // This year's jarring shift from onsite to remote work offers CROs an opportunity to redefine security standards for remote collaboration. For example, home networks now process the same level of workloads as corporate networks, and the increase in VPN usage means increased commingling of company data and personal devices. As digital collaboration and file-sharing become routine, risk leaders should try to respond constructively to the increasing pace of change without hampering the organization's ability to keep pace with the market. They can work closely with the CIO and CTO to assess upcoming changes to collaboration tools and decide on a risk posture that works for the near term. Risk leaders can also anticipate further challenges and changes as a broad return to corporate offices takes place.

ARE YOU READY?



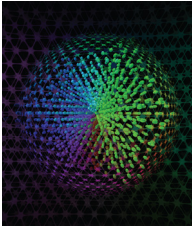
KEY QUESTIONS

1 How do you assess employee and team performance of remote workers? What steps are you taking to improve performance?

2 What steps have you taken to virtually nurture the spontaneous employee connections and dialogue that drive innovation?

3 What have you concluded about the long-term role of physical workspace? How will office design and technology tools support optimal collaboration and productivity?

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