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Create Business Resiliency With High-Performance, Stable PCs

A FORRESTER CONSULTING THOUGHT LEADERSHIP PAPER COMMISSIONED BY INTEL, FEBRUARY 2022

Table of Contents

3 Executive Summary

4 Key Findings

5 Hybrid Work Is The Future Of Work

9 Older PCs Aren't Ready To Support Hybrid Work

11 PC Buying Faces A Tectonic Shift Due To Hybrid Work

14 Investing In Stable, High-Performing PCs Will Reap Many Rewards

16 Key Recommendations

18 Appendix

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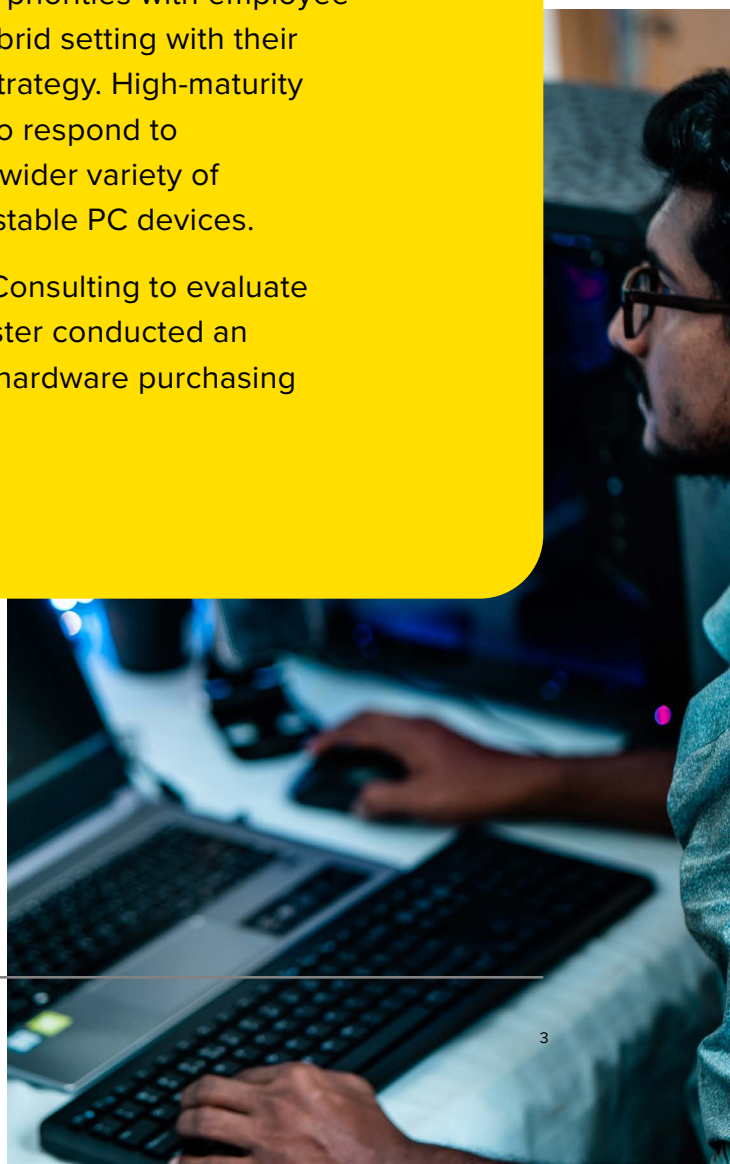
Executive Summary

The long-heralded future of work is here: IT decision-makers (ITDMs) are no longer debating if their business can support remote work, but how their business can best support their remote workforce with the right tools and technologies needed to work in a distributed fashion. The rapid shift forward to hybrid work environments — where employees can work at home and in the office as the needed — has established new priorities for ITDMs to focus on. Many are taking advantage of hybrid work as a permanent strategy to drive employee experience. Remote work has taught ITDMs that PCs are the connective tissue that empowers their employees to work across a variety of settings — be it at home, in the office, in a coworking space, or a client site.

While many organizations responded to the pandemic by shifting employees to remote work, we found that there are key factors that differentiate highly mature organizations from less mature organizations: regularly replaced PC devices; aligning PC-buying priorities with employee demands; empowering employees to work in a hybrid setting with their PC devices; and aligning goals for a hybrid work strategy. High-maturity organizations were more flexible and better able to respond to ever-changing requirements, and therefore saw a wider variety of benefits when investing in high-performance and stable PC devices.

In November 2021, Intel commissioned Forrester Consulting to evaluate the role of PC devices in the future of work. Forrester conducted an online survey with 611 global end-user computing hardware purchasing decision-makers to explore this topic.



Key Findings

The pandemic has fundamentally shifted work. Before the COVID-19 pandemic, the majority of organizations had less than 10% of their employees working remotely. At the height of the pandemic (to date), 52% of organizations had half or more of their workforce working remotely. This rapid shift to remote work created new challenges for IT departments. Critically, most expect their workplaces to remain flexible moving forward: 54% of surveyed decision-makers say that their workforce will be hybrid.

PCs are the connective tissues that empower employees to work across a variety of settings. In light of these shifts in working conditions, PCs have become critically important for supporting hybrid work and enabling employees to work where, when, and how they need to: 85% of surveyed ITDMs say that ensuring that the PCs they buy for their workforce allow employees to get everything they need to get done wherever they are.

The future of work requires stable and high performing PCs. PC buying is undergoing a monumental shift: 87% of ITDMs said that they are thinking about PC device purchasing differently because of the hybrid work world. Organizations that are investing in stable, high-performing PCs are seeing the benefits, and those that don't risk being left behind.

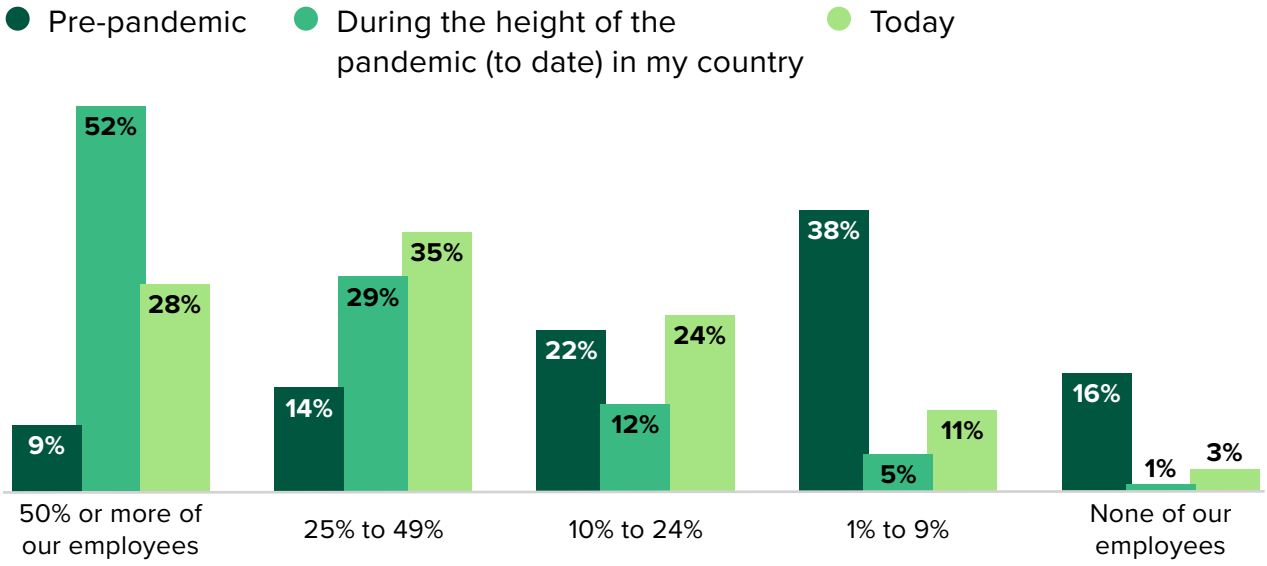
Hybrid Work Is The Future Of Work

The COVID-19 pandemic has created ever-shifting goalposts as ITDMs try to craft post-pandemic work strategies. If the pandemic has taught leaders anything, it's that the best-laid plans are those that are most flexible. In March 2020, many ITDMs had to rapidly shift large portions of their workforce to remote work. Now they are tasked with balancing the needs of a workforce that is constantly moving between working from home, the office, and on the road.

- **The pandemic redefined the location of work.** Before the pandemic, the majority of organizations had less than 10% of their employees working remotely. Fifty-four percent of organizations surveyed had 9% or less of their employees working remotely pre-pandemic; at the height of the pandemic to date within their country, that number was only 6% (see Figure 1). This reveals the monumental — and rapid — task that ITDMs had to undertake in the early days of the pandemic to move their employees out of the office.

Figure 1

"To the best of your knowledge, what percentage of employees worked remotely during the following periods?"

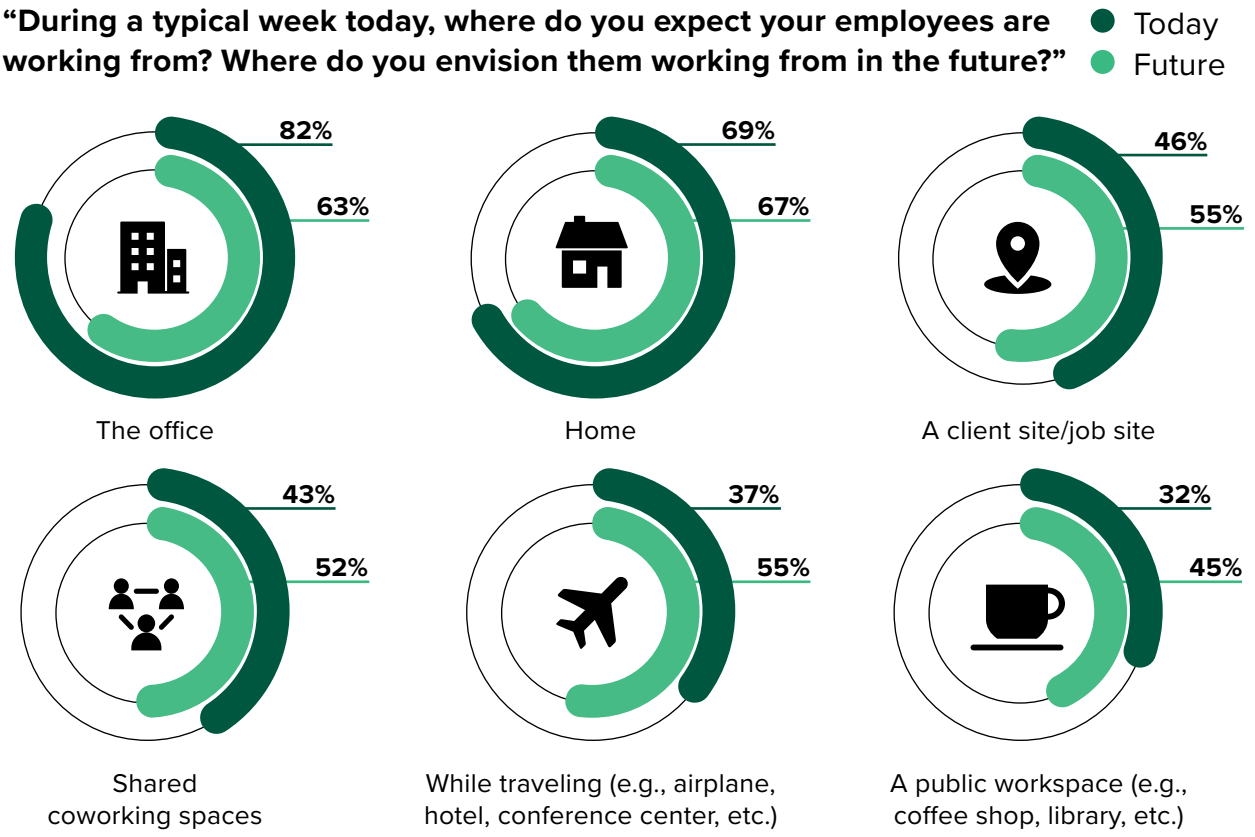


Base: 611 Global directors and higher with responsibility over technology selection, strategy, and device (PC/laptops) investment for their organization.
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021

- **As of today, the status of offices remains in flux.** Twenty-seven percent of ITDMs report that most employees are remote full-time, 36% report that most of their employees are working hybrid (some hours in the office and some at home), and 36% say that most employees have returned to the office full-time. This nearly even split illustrates the wide range of environments that ITDMs must be prepared for.
- **Moving forward, most expect their post-pandemic workplaces to be highly flexible.** Fifty-four percent of respondents surveyed note that their workforce will be hybrid — working from home a few days a week and working the rest of the days in the office. Only about a quarter of respondents plan to return to the pre-pandemic status quo of all employees reporting to the office. Employees are overwhelmingly in support of a hybrid work future: 86% of ITDMs noted that their employees want a hybrid work environment moving forward.

Figure 2

"During a typical week today, where do you expect your employees are working from? Where do you envision them working from in the future?"



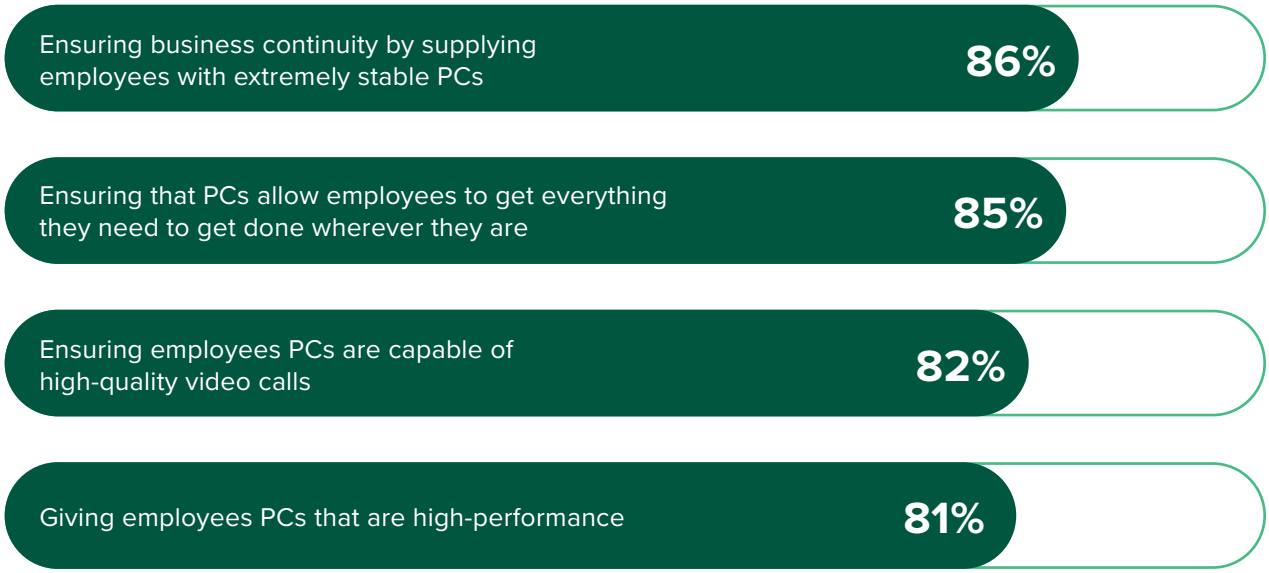
Base: 611 Global directors and higher with responsibility over technology selection, strategy, and device (PC/laptops) investment for their organization.
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021

- **Hybrid work means that employees will be working from numerous locations.** In a typical week today, ITDMs expect their employees to be working from three discrete locations on average — most commonly, the office, home, and a client or job site. In the future, ITDMs expect employees to be working from even more locations (see Figure 2). Through it all, the PC is the central tool to get work done — be it in a shared coworking space, presentation at a client site, or home office. And ITDMs recognize the importance of flexible work: 87% agreed that in the future, their employees should be able to easily switch physical locations while working.
- **Given the flexible future of work, ITDMs' top priorities include improving endpoint security and investing in new end-user PCs.** As employees work from more locations, it's increasingly imperative that ITDMs improve endpoint security across their ecosystems. It's no surprise that improving endpoint security is the top priority for 78% of ITDMs surveyed. Additionally, two-thirds of respondents note that investing in new end-user PC devices was a critical or high priority for their IT organization over the next 12 months and 69% indicate that enabling hybrid work for their employees was a top priority.
- **ITDMs see the value of investing in high-performing PCs.** Eighty-six percent of ITDMs note that ensuring business continuity by supplying employees with extremely stable PCs is a very important or important priority when deciding which PCs to buy in the future. Additionally, 85% of respondents note that ensuring the PCs will enable their employees to get everything they need to get done wherever they are is an important priority and 81% say that giving employees high-performance PCs is important for the future. As employees are increasingly distributed across locations, video calls are a critical tie that binds teams together. To that end, 82% of ITDMs say that ensuring their employees' PCs are capable of high-quality video calls is an important requirement for the PCs they plan to invest in (see Figure 3).

Figure 3

"Employees will be working in a more distributed fashion at many organizations. How important will each of the following priorities be for the PCs you buy for employees in the future?"

(Showing "Very important" and "Important" combined)



Base: 611 Global directors and higher with responsibility over technology selection, strategy, and device (PC/laptops) investment for their organization.
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021

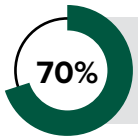
Older PCs Aren't Ready To Support Hybrid Work

PCs are critically important for supporting hybrid work and enabling employees to work where they need to, when they need to, and how they need to. However, ITDMs say that current PCs are falling short in numerous ways. To enable the future of work, it's critical that organizations overcome these challenges and invest in PCs that support their hybrid work strategies.

- **Half of ITDMS struggle to support hybrid work with today's PCs.** ITDMs face numerous challenges with their current PCs: 70% note that poor PC performance erodes their employees' productivity; 61% note that their ability to support hybrid work is inhibited by poorly performing PCs; and 58% indicate that they are struggling to support future hybrid work with today's PCs (see Figure 4).
- **IT organizations are feeling increased strain when managing a hybrid work environment.** Fifty-nine percent of ITDMs say that they are struggling to remotely manage PCs the way they want. The top barrier to supporting a hybrid work environment is the increased challenges IT departments face managing PCs. A hybrid work environment requires IT departments to remotely, securely, confidently, and quickly update and manage devices in their fleets.
- **Employees are also frustrated with current PC performance.** As remote work requires more videoconferencing, 59% of ITDMs reported that their employees say they are fatigued by too many poor quality video calls. Overall, the top frustrations that ITDMs most commonly heard

Figure 4

"Please state your agreement with the following statements."



Poor PC performance erodes our employees' productivity.

Our ability to support hybrid work is inhibited by poorly performing PCs.

Employees are fatigued by too many poor-quality video calls.

We struggle to remotely manage PCs the way we want.

We struggle to support future hybrid work with today's PC devices.

Base: 611 Global directors and higher with responsibility over technology selection, strategy, and device (PC/laptops) investment for their organization.
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021

from their employees are networking issues, short battery life, slow processing speeds, and cumbersome security protocols. PCs are the backbone of hybrid work, but without high-performing and stable PCs enabling their workforce, business will suffer.

PC Buying Faces A Tectonic Shift Due To Hybrid Work

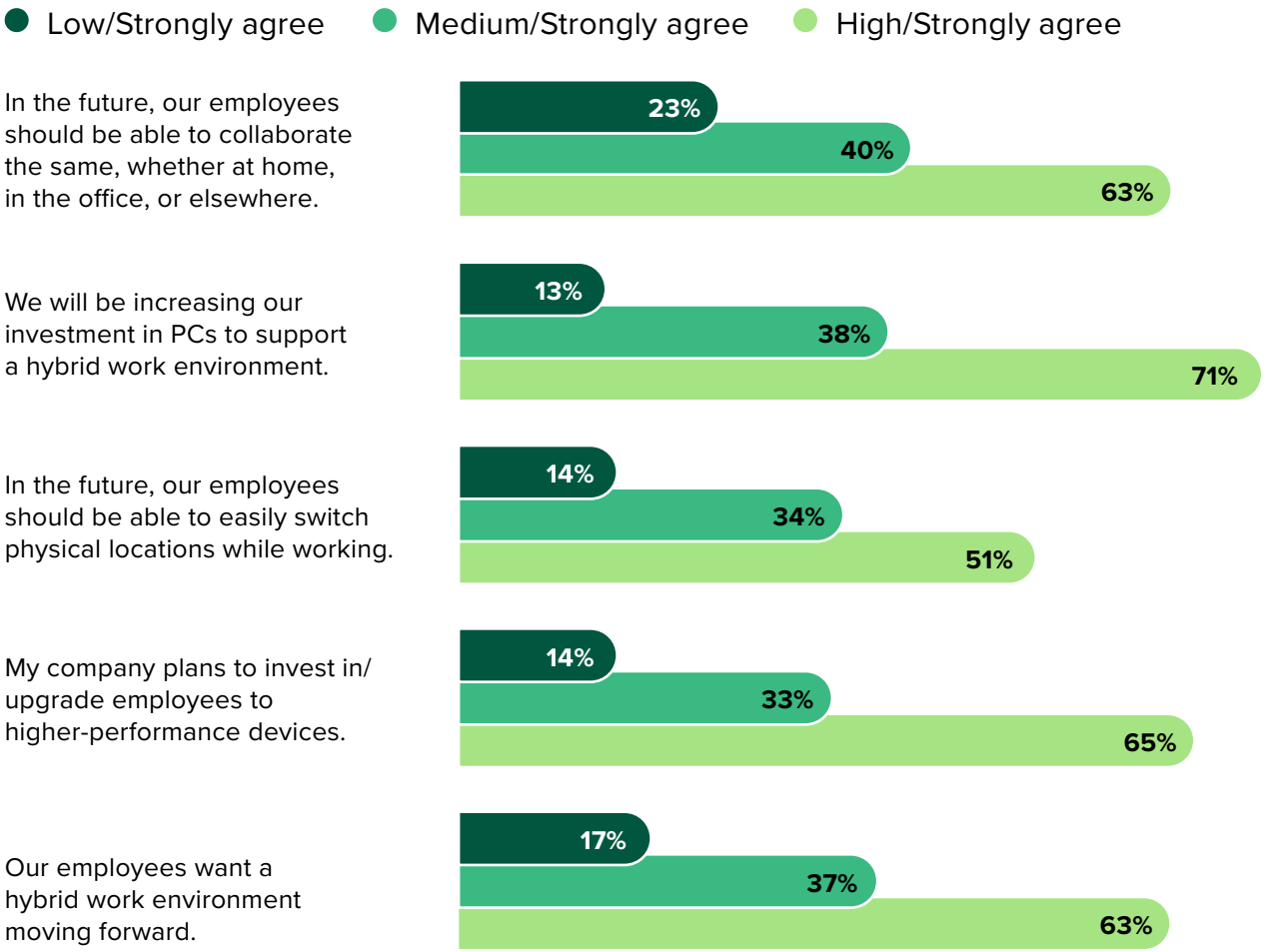
An overwhelming 87% of ITDMs said that they are thinking about PC device purchasing differently because of the hybrid work world. When looking specifically at high-maturity organizations, two-thirds strongly agree with the sentiment, compared to just 27% of low-maturity organizations. As ITDMs enter the new future of PC buying to support hybrid work, it's critical that PC devices are stable and high-performing.

- **Hybrid work requires stable and high-performing PCs.** Eighty-seven percent of respondents agree that hybrid work requires that employees have stable, dependable PCs; 86% agree that hybrid work will require that employees have high-performing PCs. While these PCs were important before the pandemic, hybrid work has magnified the need for dependable PCs for a distributed workforce. Critically, high-maturity organizations are significantly more likely to recognize the importance of stable and high-performing PCs to support hybrid work: 67% of high-maturity respondents strongly agree that hybrid work will require stable, dependable PCs, compared to just 16% of low-maturity respondents. Seventy percent of high-maturity organizations strongly agree that hybrid work will require high-performance PCs, compared to just 27% of low-maturity organizations.

High-maturity organizations are those that are replacing devices regularly, aligning their PC-buying priorities with employee demands, empowering their employees to work in a hybrid setting with their PC devices, and aligning their goals for a hybrid work strategy.

Figure 5

"Please state your agreement with the following statements."



Base: 611 Global directors and higher with responsibility over technology selection, strategy, and device (PC/laptops) investment for their organization.
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- **ITDMs plan to increase their investment in PCs to support hybrid work.** Eighty-seven percent of ITDMs say they will be increasing their investment in PCs to support a hybrid work environment and 86% note that their company plans to invest in and upgrade employees to higher performance devices. In particular, high-maturity organizations are significantly more likely to increase their investments; 71% of high-maturity organizations strongly agree, compared to just 13% of low-maturity organizations, that they will be increasing their investment to support hybrid work (see Figure 5). Similarly, 65% of high-maturity organizations strongly agree they will be upgrading their employees

to higher-performing devices, compared to just 14% of low-maturity organizations. High-maturity organizations recognize the big changes that hybrid work will require of them, while low-maturity organizations risk languishing.

- **Performance, security, and reliability are the top three selection factors for ITDMs.** When selecting end-user PCs for their employees, over half of respondents note that performance, security, and reliability are key factors that matter in their selection process. This is in large part because 90% of ITDMs recognize that reliable PC devices improve their employee experience (EX). Improving EX is a key driver for 88% of ITDMs investing in PCs. Looking ahead, nearly 50% of ITDMs noted that a high-quality videoconferencing camera is a top feature on their wish list for future employee PCs – video calls are not going away, and ITDMs recognize that they must invest in devices that provide quality experiences for their employees.

Investing In Stable, High-Performing PCs Will Reap Many Rewards

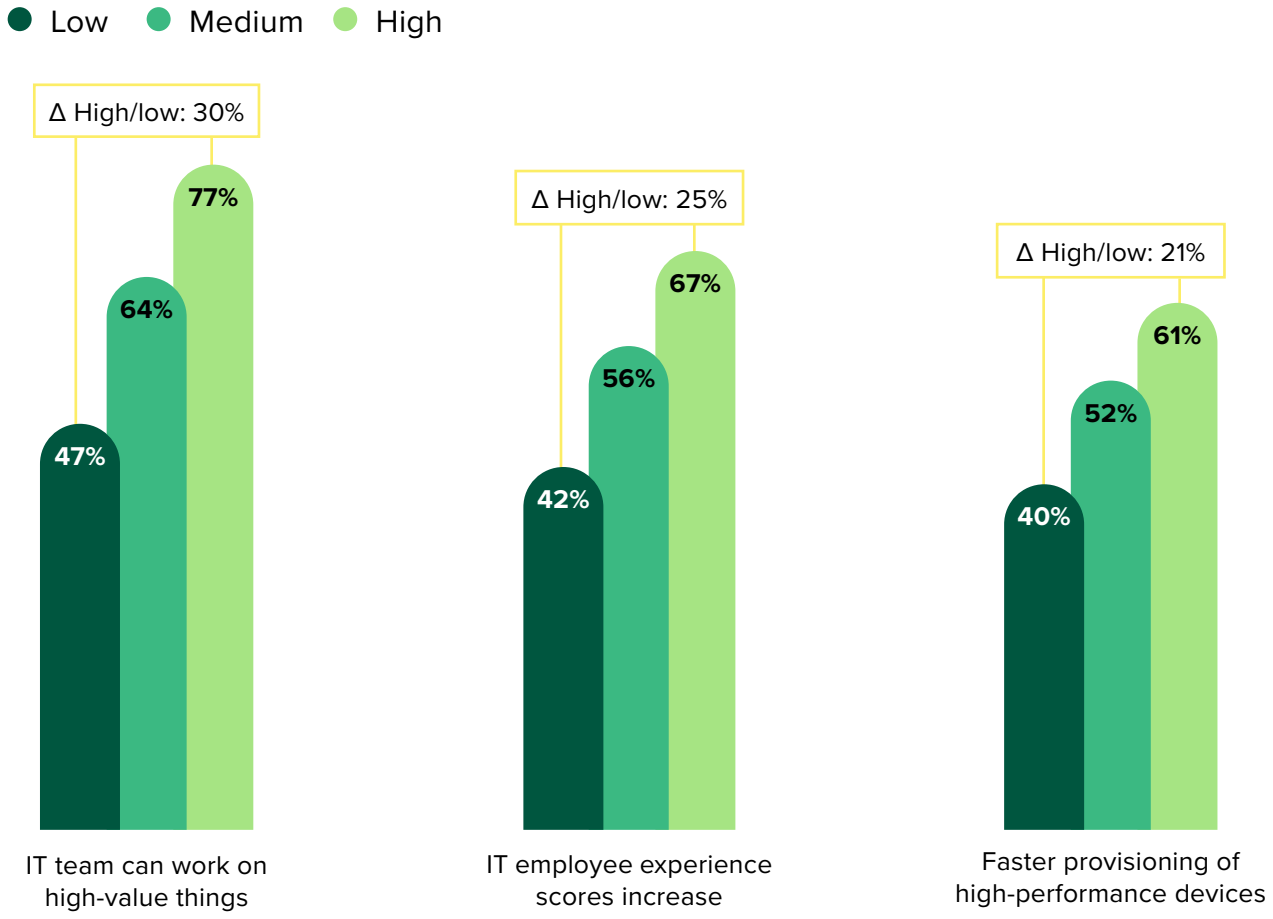
Highly mature organizations — those that are replacing devices regularly, aligning their PC-buying priorities with employee demands, empowering their employees to work in a hybrid setting with their PC devices, and aligning their goals for a hybrid work strategy — are seeing many benefits across the business.

- **Overall, improved productivity and better EX are top employee-focused benefits of investing in PC devices for hybrid work.** Nearly half of all employees see improved productivity as the top employee-focused benefit from organizations investing in PCs that are both high-performing and stable for hybrid work. Critically, high-maturity organizations are far more likely to see greater compatibility with their hybrid work future and higher employee retention when they invest in high-performing and stable PCs.
- **Improved productivity is also the top business benefit of investing in PCs suitable for hybrid work.** In addition to improved productivity, 48% of ITDMs expect better security when investing in high-performing and stable PC devices. Interestingly, high-maturity organizations are 20% more likely to experience improved employee retention and 19% more likely to see increased innovation as benefits of investing in high-performing and stable PCs than low-maturity organizations are. Critically, high-maturity organizations are also 17% more likely to see improved employee well-being as a benefit — pointing to the holistic view that these high-maturity organizations take to PC device investment.
- **Investments in high-performance, stable PCs pay dividends for IT organizations as well.** While over half of IT departments foresee improvements in EX and faster provisioning by investing in high-performing and stable PCs, high-maturity organizations are more likely to be anticipating these benefits. High-maturity organizations are 30% more likely to see their IT organization able to work on high-value tasks, 25% more likely to see increased IT EX scores, and 21% more likely to see faster provisioning of high-performance

devices as top benefits, compared to low-maturity organizations (see Figure 6). Investments create a virtuous cycle, as IT organizations are able to handle tactical processes — like provisioning — more quickly and can focus on the higher-value, higher-satisfaction strategic goals and creating a better employee experience.

Figure 6

"What benefits does the IT department anticipate from investing in PCs that are both high-performing and stable for hybrid work?"



Base: 611 Global directors and higher with responsibility over technology selection, strategy, and device (PC/laptops) investment for their organization.
Source: A commissioned study conducted by Forrester Consulting on behalf of Intel, November 2021

Key Recommendations

The pandemic catalyzed changes in how and where organizations work, but those changes will last far beyond the pandemic itself. The growth of hybrid work styles in which more employees work in a distributed fashion will transform where and how work gets done. At the center of hybrid work sits the PC — and 70% of global leaders say that poor performance erodes their employees' productivity.

Forrester's in-depth survey of global directors with responsibility over technology selection and PC/laptop investments about the future of work yielded several important recommendations:

All companies should audit the performance and stability of their PC fleet.

As most organizations embrace distributed work, they will need to reconsider how their PC fleets perform in the face of hybrid work styles. For instance, 59% of leaders say that employees are fatigued by too many poor-quality video calls — an issue that can be ameliorated by high-performance, stable PCs. Execute this audit against applications that will be crucial to hybrid work and incorporate employee feedback.

All companies should link PC performance and stability to EX.

EX measures the entirety of an individual's relationship with their employer, and technology can drive or inhibit EX. In a world of distributed work, the PC forms the portal into which collaborations and productivity happen. Build bridges with EX leaders, whether they sit in IT, HR, or business units, to understand how PCs can play a positive role in driving EX.

Mature companies should build systems for long-lasting success.

Companies that scored high on our maturity index are already embracing the importance of PC performance and stability alongside a commitment to hybrid work. But it's not a one-and-done exercise. For example, high-maturity companies should consider PC refresh cycles, improving budgeting for shortening them. And a PC-as-a-service option might be a route to updated hardware, too.

Medium- and low-maturity companies should build a business case.

Companies that don't invest in newer, high-performance, and stable PCs tend to face internal obstacles. Often, it's a matter of building a business case in some detail. For example, high-maturity companies score better on ROI-driving metrics than low-maturity firms. Their IT teams can work on high-value tasks (30 percentage points higher), driving productivity; they can provision devices faster (21 percentage points higher). Build a detailed business case including hard, measurable factors like future hiring of IT staff and employee productivity as well as broader factors like EX.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 611 across industry decision-makers at organizations in United States, EMEA, and Asia Pacific (APAC) to evaluate laptop usage and support in today's hybrid work reality. Survey participants included decision-makers responsible over technology selection, strategy, and device (PC/laptops) investment for their organization. Questions provided to the participants asked technology on the workplace. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in October 2021 and was completed in November 2021.

Appendix B: Demographics

COUNTRY	
United States	**17%**
United Kingdom	**17%**
Germany	**16%**
India	**17%**
China	**17%**
Japan	**16%**

RESPONDENT LEVEL	
C-level executive	**41%**
Vice President	**17%**
Director	**42%**

POSITION/DEPARTMENT	
IT	**97%**
Procurement	**3%**

MANAGING END-USER COMPUTING HARDWARE	
We manage all of our end-user hardware computing with a dedicated in-house team.	**52%**
We manage most of our end-user hardware computing with a dedicated in-house team but outsource some to a third-party vendor or consultant.	**48%**

COMPANY SIZE	
100 to 499 employees	**10%**
500 to 999 employees	**23%**
1,000 to 4,999 employees	**33%**
5,000 to 19,999 employees	**21%**
20,000 or more employees	**12%**

PC DEVICES ALLOCATED TO YOUR COMPANY	
Employees are allowed to choose any PC device they'd like.	**30%**
Employees are allowed to choose their PC device only from a predefined list of options.	**50%**
Employees are allowed to bring their own device (BYOD).	**3%**
Employees have no choice in their PC device.	**17%**

MATURITY CUT	
High-Maturity	**24%**
Medium-Maturity	**52%**
Low-Maturity	**24%**

Note: Percentages may not total 100 due to rounding.

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