

Forrester Opportunity Snapshot: A Custom Study Commissioned By Microsoft | December 2018

# Equip Firstline Workers With Better Tools To Drive Engagement

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# Equip Firstline Workers With Better Tools To Drive Engagement

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## Firstline Workers Are Underserved By Transformation Efforts

Digital transformation is only continuing to grow in importance as technology advances. But as companies deploy transformative and enterprisewide technology, one particular blind spot for many organizations is the failure to include firstline workers and their toolsets in the effort. Firstline workers represent a massive untapped potential — they typically compose the majority of an organization's workforce and are the first point of contact between the company and world it services. They are the first to engage with customers, the first to represent a company's brand, and the first to see a product and service in action. By empowering these employees with mobile and dynamic tools, businesses can improve employee engagement and productivity, customer satisfaction, and ultimate business outcomes.

In September 2018, Microsoft commissioned Forrester Consulting to evaluate the adoption and efficacy of tools in use by firstline workers. We found sizeable gaps between the perceptions of management and the actual experiences of firstline workers and uncovered a lack of utilization in mobile and data-driven tools, which consequently did not drive improved employee experiences and business successes.



### Geography

- › North America and Europe



### Position

- › Firstline workers: 50%
- › Managers: 20%
- › Directors: 16%
- › VP/C-level: 15%



### Key industries

- › Retail: 17%
- › Healthcare: 17%
- › Government: 17%
- › Financial services: 17%



### Company size (employees)

- › 20,000+: 22%
- › 5,000 - 19,999: 30%
- › 1,000 - 4,999: 37%
- › 500 - 999: 11%

Note: Percentages may not total 100 because of rounding.

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## A Workforce Divided

Full-time, non-management employees at organizations generally fall into one of two categories:

**1) Information workers.** These employees use information to make decisions or take actions, or they use it to create information that informs the decisions/actions of others. They typically work in roles, with a dedicated computer, that require some interpretation or judgement in order to solve dynamic problems.

**2) Firstline workers.** These employees play a direct role in the production of goods/services to customers. Firstline workers primarily consume and/or collect information. They typically require a higher degree of mobility and adherence to relatively well-established procedures to perform tasks. The device requirements of firstline workers typically differ by industry, role, and responsibility.

Firstline workers comprise the largest category of employees at most organizations. Their functions are mission-critical; as the face of the company, they play a role in just about every customer interaction and every product and service that is delivered. Empowering them to do their best work and leveraging their experiences to guide business decisions is a huge opportunity for businesses. Yet, they are often not given the tools nor the forums to optimize these customer experiences and to share their learnings from these interactions back with the company.

### Sample Firstline Worker Roles



Bank tellers



Production line workers



Store managers



Flight attendants



Maintenance workers



Administrators



Restuarant waiters



Customer service reps



Field technicians

*Firstline workers outnumber other corporate workers 4-to-1 in industries such as hospitality, manufacturing, retail, and healthcare.<sup>1</sup>*

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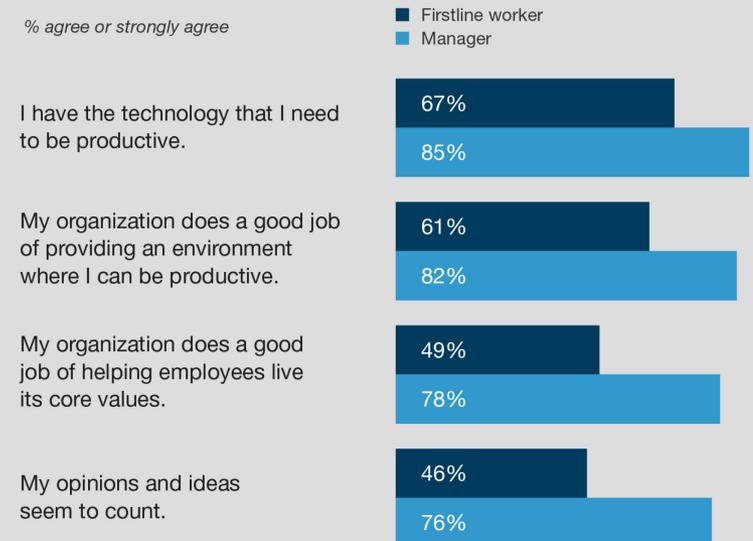
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## Managers Think That Firstline Workers Are Better Equipped Than They Truly Are

According to Forrester data, 77% of firstline workers (FLWs) agree or strongly agree that technology is important to their roles at work.<sup>2</sup> This should be reassuring to company executives, who are widely investing substantial resources into digital transformation. However, those investments are often focused on: 1) giving information workers access to insights and 2) automating and digitally connecting the customer experience. In many cases, firstline workers are left out of the equation and stuck with using outmoded and suboptimal tools to get their jobs done.

We asked firstline workers to rate their agreement with a series of sentiments regarding their organization and the technology that they have been given to do their jobs. We then asked managers to rank the same, on behalf of their firstline-worker employees. The two segments did not often see eye-to-eye — business development managers (BDMs) are much more likely than their employees to feel that the organization is enabling productivity and inclusiveness. Business leaders looking to increase the efficiency and effectiveness of their workforce must extend digital efforts to include maintenance workers, retail associates, nurses, flight attendants, store managers, and others. This holistic approach will be crucial for realizing the digital aspirations and potential for an organization.

“Please rate your agreement or disagreement with the following statements.” [FLWs answered for themselves; managers answered for the FLWs that they manage]



Base: 301 firstline workers at North American and European enterprises/304 manager-level and above business decision makers responsible for FLW tools  
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, September 2018

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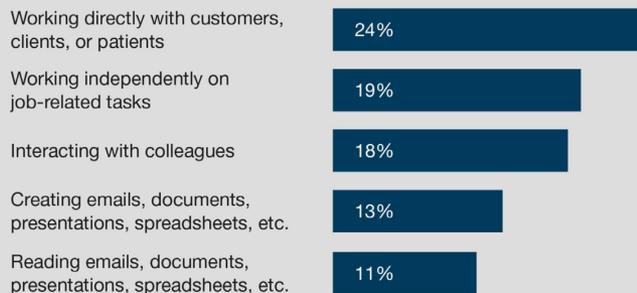
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## Tools Are Not Yet Optimized For The Needs Of The Firstline Worker

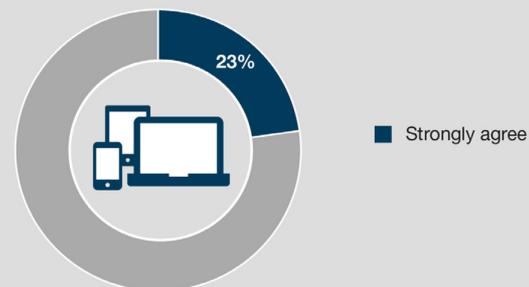
Firstline workers operate differently from information workers, and therefore have different requirements of their tools — requirements that are frequently overlooked in digital transformation efforts. One example is mobility: Whether in a hospital, a retail store, or part of a field sales or service organization, firstline workers do not stay tied to stationary workstations. However, their most important tools are typically not portable — and management doesn't realize it. Fewer than half of the firstline workers we surveyed agreed that the tools they use do a good job of allowing them to be mobile, whereas 75% of managers feel similarly. This trend extends to other workflows, with firstline workers feeling less optimistic than managers about their access to relevant information, task automation capabilities, collaboration tools, etc. Overall, only 23% of firstline workers strongly agreed that they have the right technology to do their jobs. The takeaway is that **executives must think more critically about how and where they invest in technology at the edge of the organization if they want to truly enable firstline workers to do their best work.**

“During a typical work day, what percentage of your time is allocated to the following activities?”



Base: 301 firstline workers at North American and European enterprises/304 manager-level and above business decision makers responsible for FLW tools  
Source: Forrester's Business Technographics™ Global Workforce Benchmark Survey, 2017

“I have the right technology/equipment needed to do my job”



Base: 301 firstline workers at North American and European enterprises  
Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, September 2018

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## Automation And AI Provide Significant Opportunity

The first step in properly equipping firstline workers generally includes a foundation of communication, collaboration, and productivity tools, made accessible on portable devices such as smartphones, tablets, laptops, and virtual workplaces. The next level of maturity includes the use of AI-driven automation.

Going into 2018, Forrester predicted a huge rise in the adoption of robotic process automation to improve employee productivity and engagement. This includes technologies such as chatbots and digital assistants that allow employees to have instant and predictive access to the information that they need to ensure consistent customer experiences, as well as automation of low-value, routine tasks to allow employees to concentrate on value-added tasks.<sup>3</sup>

Our study found that the vast majority of firstline workers are not yet benefiting from these investments. According to the business decision makers we surveyed, the only tools that are being given out to a majority of employees are email (62%) and training and development platforms (57%). Only 25% of managers say that they are currently automating routine activities for their firstline workers. Further, only 30% of firstline workers report having access to a predictive tool, and 21% have access to a digital assistant.

“Which of the following tools do you offer to improve the employee experience for firstline workers?”



Base: 304 manager-level and above business decision makers at North American and European enterprises  
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## Employee Experience Drives Business Benefits

Forrester has found that internal surveys which measure employee engagement tend to focus on the wrong metrics, conflating company buy-in (which tends to be higher) with actual on-the-job satisfaction (which tends to be lower).<sup>4</sup> The true path to employee happiness is making progress each day in their work — and studies going back as far as 1994 have repeatedly proven that employee satisfaction leads to business results, such as customer loyalty and profitability.<sup>5</sup>

This feeling of productivity is something that employers can foster through the smart use of intelligent, integrated, and mobile tools. While only 23% of employees strongly agreed that they currently have the technology they need to be productive, 50% of employers reported that they feel the tools they offer make employees' jobs easier and/or more satisfying — to a high enough degree that it should be considered a competitive perk. It's critical that decision makers solicit feedback from these employees in order to align on needs. By understanding and providing employees with what they really need to be successful, business decision makers can unlock incredible potential to drive business results.

### Benefits Of Employee Experience



Better customer experience



Lower employee turnover



Higher financial performance

An exceptional employee experience attracts talent and boosts workforce engagement, productivity, and retention. This directly improves business performance, customer outcomes, and the bottom line. Success will increasingly depend on your people, the tools provided, and the employee experience that is created and protected.

Source: "The Employee Experience Imperative," Forrester Research, Inc., December 15, 2017.

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## Firstline Workers Want Collaboration And Access To Information

So, what kinds of tools does a company invest in if they want to make employees productive and satisfied?

Firstline workers cited a long list of things that they'd like to see from their tools, and a few key trends emerged. Many firstline workers rely on their colleagues, managers, and even customers for two-way information, instruction, and interaction throughout the day. The ability to communicate and collaborate with those individuals was a top requirement for tools.

Additionally, the ability to both create and access information was a consistent ask of the surveyed firstline workers. Many firstline workers want the ability to track their work throughout the day, and they often need access to information from various databases.

Many of these common requirements are served by non-industry-specific communication and collaboration tools that can be deployed on computers or mobile devices. Modern, cloud-connected tools can integrate these capabilities and often include complementary security and compliance capabilities — which are critical considerations for the leaders looking to invest in them.

“Thinking about the tools you use to do your job, what capabilities/attributes do you desire most?”

*Ranked in top 5*



Base: 301 firstline workers at North American and European enterprises  
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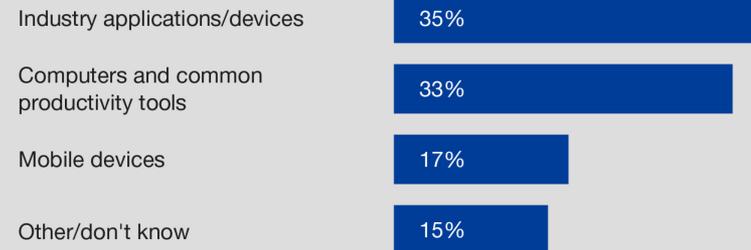
## Tools Vary By Industry And Role

In addition to collaboration and productivity tools, firstline workers often heavily rely on industry-specific devices and applications that perform specialized functions.

We asked firstline workers what their most useful tool was at work and 35% cited such industry-specific tools or devices. These ranged from specialized medical equipment and electronic medical records systems in healthcare, to pickers and scanners in shipping and manufacturing, to design programs, customer management systems, and mobile checkout scanners. Many employees also stated that their most useful tools were mobile devices such as smartphones and laptops, and that they were using industry-specific applications on those devices.

Decision makers looking to enable their firstline workers may consider integrating collaboration and productivity tools with the more specialized functionality delivered by other equipment. They should prioritize secure and integrated solutions that connect and empower employees and deliver the security, compliance, and management oversight that they expect from enterprise grade solutions.

### “What is the most valuable/useful tool or application you use at work?”



Base: 301 firstline workers at North American and European enterprises  
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## A Modern Workplace Helps Firstline Workers Drive Business Success

Modern experiences, devices, and tools are most strongly linked to business improvements. Our survey asked business decision makers to rate their current success against key business metrics compared to two years ago. Those businesses who provide tools that facilitate digital collaboration, automation of routine activities, and efficiency in role-specific workflows are much more likely than their counterparts to say that they've seen "very significant" improvements over the last two years in metrics such as teamwork, productivity, employee retention, and even customer satisfaction scores.

Additionally, businesses that invest in modern devices which deliver automation, mobility, and new ways of working are realizing significant gains and advantages. Intelligent tools — such as bots and mixed reality — are linked to businesses that have seen "very significant" improvements over the last two years in metrics such as employee innovation and speed-to-market of new products and services. Executives who are looking to invest in firstline workers to drive business performance should consider each component that defines their firstline working environment and prioritize intelligent, portable, and integrated solutions and devices.

### Firstline Worker Tools That Most Highly Correlate To Business Success:

	Robots or intelligent agents
	Mixed/augmented reality
	Wearable devices
	Purpose-specific mobile devices
	Digital collaboration tools
	Automation of routine activities
	Role-specific applications

Base: 304 manager-level and above business decision makers at North American and European enterprises  
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## Conclusion

Firstline workers are currently underserved by the technologies their organizations provide them with, and it's a constraint that affects their engagement, the customers' experience, and the financial performance of their organizations. Investments in better, more role-specific technology for firstline workers will pay off by making it easier for these workers to make progress in their work.

Key areas of investment should include better productivity, collaboration, and access to task-critical information — and applying AI to remove some of the mundane work that prevents firstline workers from engaging in value-added tasks.

Decision makers should prioritize their technology investments not by how much money they can save, but by how much more effective they can be in helping their firstline workers to win, serve, and retain customers.

### Key actions for executives:

- Gain organizational buy-in on the opportunity represented by empowering the firstline workforce.
- Align the business on a few key journeys to optimize first, which will serve as quick wins to validate future investment.
- Audit the company's existing firstline capabilities to determine what gaps exist and which improvements can deliver the highest impact.
- Round out your digital transformation by implementing modern technologies that will empower all workers organizationwide to do their best work.

### Project Director:

Mark Brozek, Principal Market Impact Consultant

### Contributing Research:

Forrester's Infrastructure And Operations research group

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## Methodology

This Opportunity Snapshot was commissioned by Microsoft. To create this profile, Forrester leveraged its existing research on workforce tools, perceptions, and experiences. Forrester Consulting supplemented this research with custom survey questions asked of 301 firstline workers and 304 manager-level and above decision makers at enterprises in the US, UK, Germany, France, and Canada. The custom survey was conducted in September 2018.

### Endnotes

<sup>1</sup> Source: "The Partner Business Opportunity For Maximizing The Impact Of Firstline Workers With Microsoft 365," Forrester Consulting report prepared for Microsoft, May 2018.

<sup>2</sup> Source: Forrester's Business Technographics™ Global Workforce Benchmark Survey, 2017.

<sup>3</sup> Source: "Predictions 2018: Employee Experience Powers The Future Of Work," Forrester Research, Inc., November 8, 2017.

<sup>4</sup> Source: "The Employee Experience Imperative," Forrester Research, Inc., December 15, 2017.

<sup>5</sup> Source: Ibid.

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### ABOUT FORRESTER CONSULTING

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