

The Business Case for a Smart Workspace



Research Report

An independent survey of IT and
business leaders in the USA



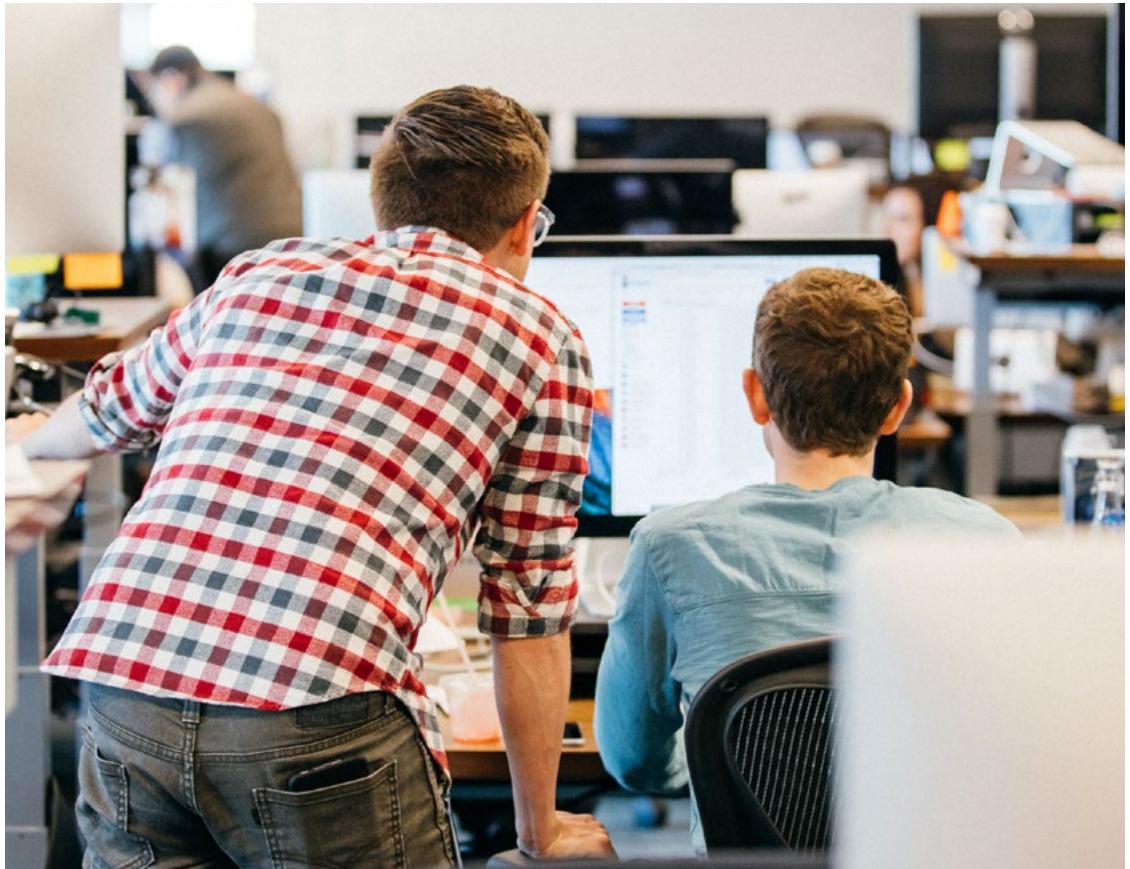
Collaboration is the key to unlocking innovation.

Organizations must innovate to grow and stay competitive. But as your business evolves, and your customer base becomes more global, the risks of you and your teams' work becoming siloed are inevitable.

Your working week is consumed by meetings, responding to emails and navigating a sea of workplace apps and tools to communicate with different teams, leaving little time for critical business work.

Your working environment is now more cluttered and complex than ever before, something we call “collaboration overload”.





Collaboration overload is the result of introducing more and more digital tools to the workplace - to help “get your work done” - without removing the old ones.

This complex tool ecosystem, means your employees are switching between an average of 35 tools a day at work, leading to lower productivity and decreased employee satisfaction, all of which have a negative impact on the business.

At Dropbox, we wanted to understand why this is happening, what business leaders such as you are doing to prevent it, and how we can go about changing it. So, we worked with Vanson Bourne to survey business and IT leads in US organizations to better understand their approach to workplace collaboration.



The research highlights that complicated workflows, non-collaborative working styles and too many tools are diluting productivity levels, diminishing employee morale and impacting business success in US organizations. Employees need a collaborative working environment where they can work smarter, not harder, and devote more time to business critical tasks.

Business decision makers are starting to recognize this, and this report looks at the challenges they are facing and how a smart workspace - which connects content, tools and teams - could be the solution.





Introduction

To investigate the collaboration challenges that US organizations are facing, we spoke to business and IT decision makers across a range of sectors, from media to technology, manufacturing, education, construction and retail.

While all would like to increase productivity and create a more simplified and collaborative working culture, most admit they are inhibited from doing so by non-collaborative working styles and complicated workflows across their teams.

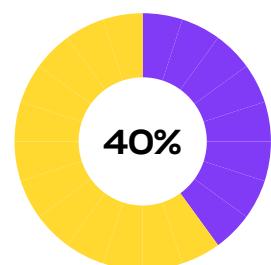


The research highlights three key themes which will be explored more in this report:

Theme One

The current way of working is making employees less productive. Complex workflows and administrative work is pulling decision makers away from business critical work.

- On average, respondents think they waste 26% of time at work on tasks that don't add fundamental value to the business.
- As a result, 40% say increasing employee productivity is a main priority for the next 12 months.
- But in order to achieve this productivity increase, 89% believe they need the ability to address the varying collaborative working needs of different teams.



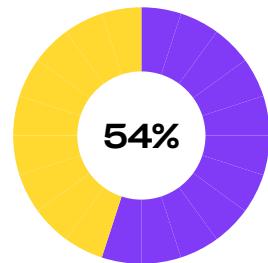
Say increasing employee productivity is a main priority for the next 12 months



Theme Two

Decision makers understand the future of their organization depends on their ability to address collaboration issues and improve team culture.

- Over half (54%) believe that significant or large improvements are needed when it comes to collaborative work across teams.
- 86% believe the overall success of their organization depends on them reinventing the way their teams collaborate both internally and externally.
- However, 89% are still experiencing barriers to improving collaborative working, most commonly battling employee culture and attitudes.

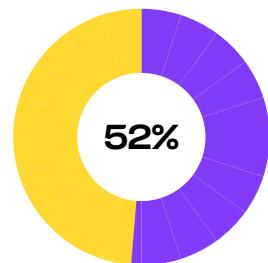


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Believe that significant or large improvements are needed when it comes to collaborative work across teams

Theme Three

Investing in a smart workspace - which brings content, tools and teams together - will help overcome collaboration challenges by improving team culture, productivity and business results.

- According to 52%, significant or large improvements are required when it comes to creating a single workspace.
- Understandably, collaboration tools are therefore among the biggest investment priorities for 36% over the next 12 - 24 months.
- This investment could be the key to overall success - 84% say a unified workspace that connects their content, tools and teams will improve business results and the way teams work.



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Believe significant or large improvements are required when it comes to creating a single workspace



Section one:

Current ways

of working



As a result of collaboration challenges decision makers are spending a great deal of time on administrative activities, instead of important work such as strategic and creative outputs.

The explosion of tools in the workplace has created a complex ecosystem for teams resulting in monotonous admin, work around work, and stifled productivity. While 2 in 5 (40%) surveyed decision makers recognize the issue and have ‘increasing employee productivity’ as one of their main priorities over the next 12 months, they aren’t leading by example.



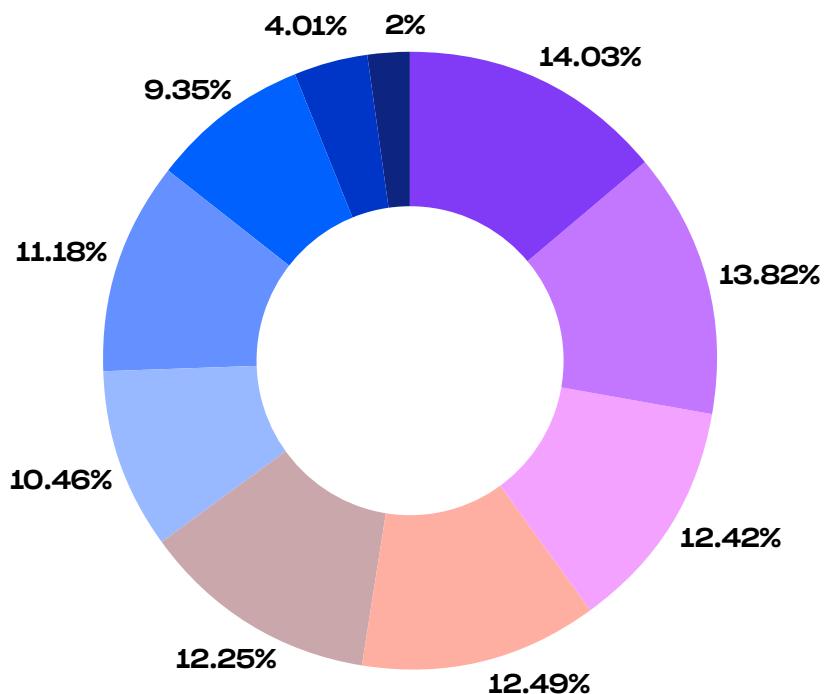


In fact, they admit to wasting 26% of time at work on tasks that don't add critical value to the business. This is the same amount of time (26%) they spend on business-critical activities such as strategy, planning, creative tasks, innovation and brainstorming.

Now ask yourself this: if decision makers like you are spending this much time - which equates to approximately a week a month - on unproductive tasks, how much time is each employee in your department wasting? And, more importantly, what's the cost to the business?

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What percentage of your time, during an average working day, do you spend on the following tasks?

- 14.03% Meetings
(face to face, online or telephone)
- 13.82% Strategy & planning
- 12.42% Email administration / reading / writing / filing
- 12.49% Using communication tools to reach people
- 12.25% Creative tasks, innovation and brainstorming
- 10.46% Creation and curation of files, content or data
- 11.18% Giving / receiving feedback or asking for / responding to requests for help / advice
- 9.35% Searching for retrieval and distribution of files, content or data
- 4.01% Other tasks
- 2% Don't know



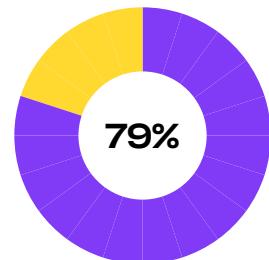


The collaboration gap: Perception vs reality

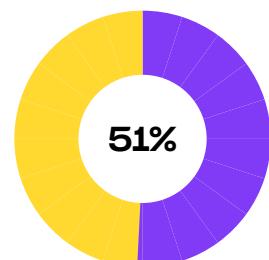
Despite this clear lack of productivity, 79% still believe they collaborate often or extremely frequently at work, but it's clear from the research this doesn't necessarily mean they're collaborating in an effective way. In fact, to maximize productivity, decision makers (89%) believe they need to work harder to understand and meet the varying collaborative working needs of different teams.

From keeping teams aligned and having the right tools and technology in place, to enabling employees to access the right content at the right time, from any location, respondents acknowledge that there's still work to be done to overcome 'collaboration overload'.

When it comes to overcoming these collaboration challenges, there's agreement that it's critical to do so. Of those experiencing gaps with their collaborative practices, over half (51%) believe that resources and time have been wasted, and 43% have seen a lack of clarity around task responsibility. Further challenges include tensions between employees and departments (40%), missed opportunities (36%) and missed deadlines (28%).



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Believe they collaborate often or extremely frequently at work

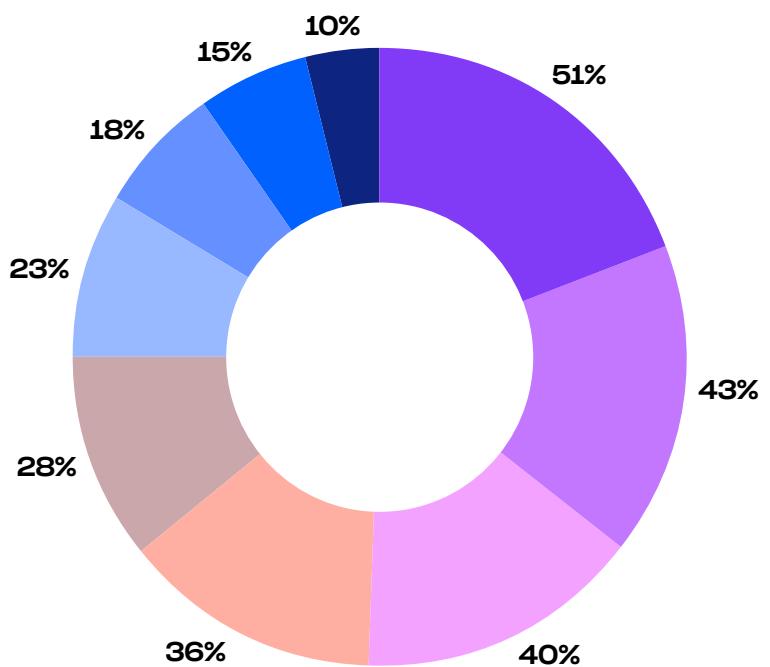


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Believe that resources and time have been wasted when experiencing gaps within their collaborative practices



Which challenges have you or your colleagues experienced as a result of difficulties with collaborative working?

- 51% Wasted resources / time
- 43% Lack of clarity around task responsibility
- 40% Tensions between employees and departments / team
- 36% Missed opportunities
- 28% Missed deadlines
- 23% Reduced innovation
- 18% Not knowing if we are working from the most up to date version of a file
- 15% Products not making it to market
- 10% None



The knock-on effect of poor collaboration is being felt not just by employees, but the research suggests it's also having a negative impact on customer satisfaction. A third of decision makers (33%) believe employee satisfaction has been severely impacted, while 1 in 5 (22%) say customer satisfaction has been negatively effected by poor collaboration.

With research showing customer and employee satisfaction has a direct impact on business results, contributing towards a healthy bottomline means business leaders have to work and push harder to create a collaborative working culture that their employees want to be part of.



Section two:

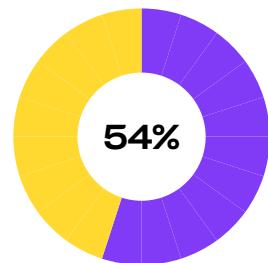
The need to improve collaborative working



Business leaders believe fostering a more collaborative working culture will help improve innovation and business outcomes, and that the future success of their organization is dependent on their ability to address existing collaboration challenges.

According to about a third of respondents, working more collaboratively with colleagues in their own team (32%) and simplifying workflows / the way teams work (34%) are among their department's top priorities over the next 12 months, with over half (54%) admitting significant or large improvements are required when it comes to internal and external collaborative working in their organization.

Despite this, almost 9 in 10 (89%) are still experiencing barriers to improving collaborative working, with culture and employee attitudes cited as the most common barrier (39%). Other barriers include problems with staying in sync with each other (34%), and an inability to focus on tasks due to tool and app overload in the workplace (20%).



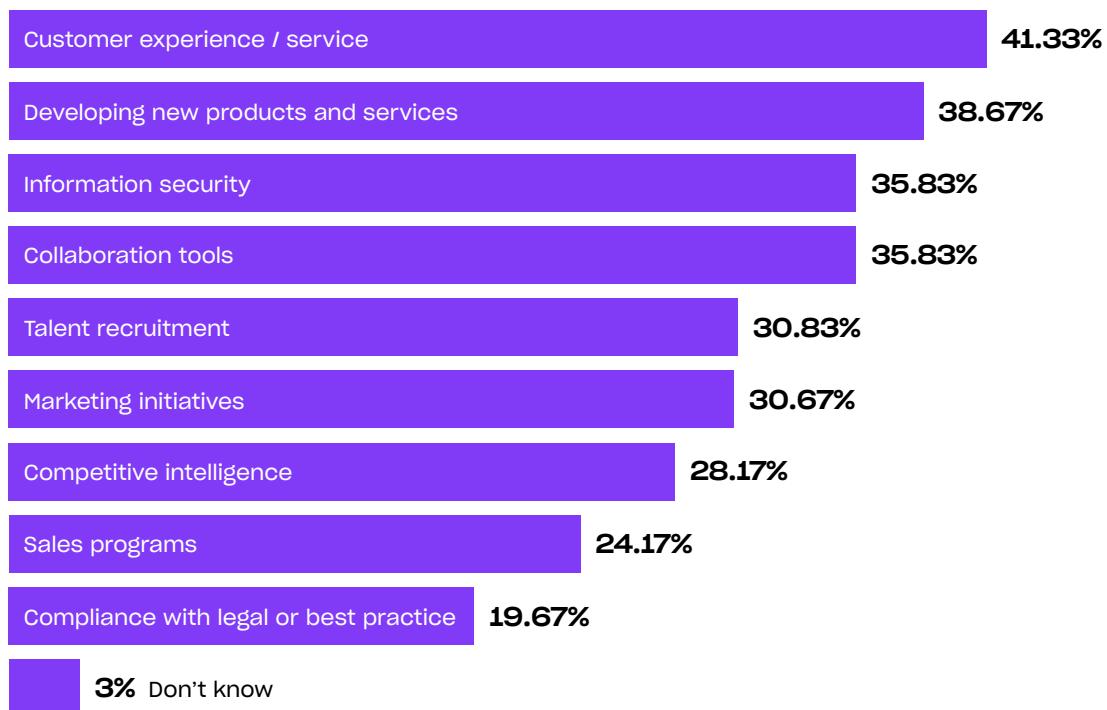
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Admit significant or large improvements are required when it comes to internal and external collaboration



Acknowledgement of these challenges is perhaps why respondents are prioritizing investment in collaboration tools. According to the research, collaboration tools are among the top three biggest investment priorities for 36% of surveyed organizations over the next 12 - 24 months, only preceded by developing new products and services, investing in the customer experience, and level with information security.



Which of the following are the biggest investment priorities for your organization over the next 12 - 24 months? Combination of responses ranked first, second and third.



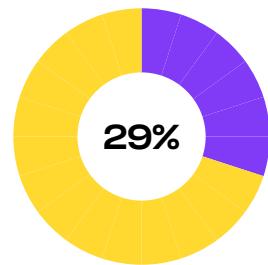


Making change happen: Who's responsible for creating a more collaborative working culture?

Although there's agreement that investment needs to be made in collaborative working tools, there's disagreement about who's responsible for creating a more collaborative working culture.

2 in 5 (43%) believe the responsibility lies with the IT department, while a similar number (42%) hold the operations team responsible. All the while, nearly a third (29%) think the C-Suite should be encouraging and enforcing a more collaborative working culture - despite 17% admitting the C-suite in their organization does not see collaborative working as a key business driver.

What's concerning, however, is that approximately 2 in 10 (19%) believe no single department, but all departments, should work together to establish a more collaborative working culture.

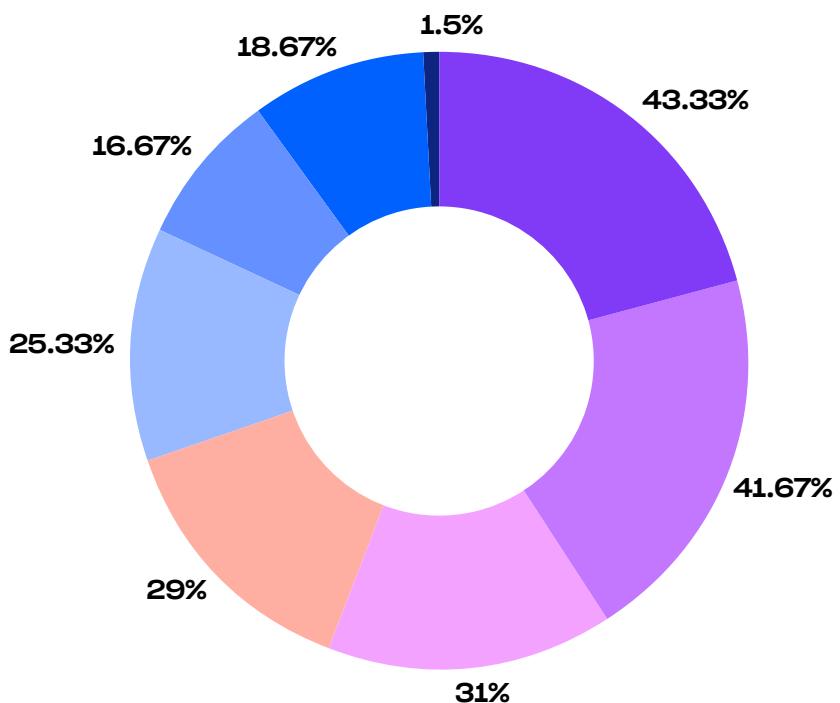


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Think the C-Suite should be encouraging and enforcing a more collaborative working culture



Which departments / teams do you believe are responsible for creating a more collaborative working culture in your organization?

- 43.33% IT department
- 41.67% Operations department / team
- 31% HR
- 29% The board / C suite
- 25.33% Marketing department
- 16.67% Finance department
- 18.67% No single department
- 1.5% Don't know



This attitude contradicts the very definition of collaboration. Technology undoubtedly plays a huge role in implementing a more collaborative culture, but putting this on the shoulders of the IT, operations team, or C-suite to implement isn't going to create the right results.

As a business or department lead, you know how your employees work, the challenges they face, and the technology that will help them work smarter, not just within your team but with the other teams. That means it's your responsibility to work with the wider business, and other department leads, to ensure you're creating the right environment for your employees to be productive and happy at work.



Section three:

Investing in a smart workspace

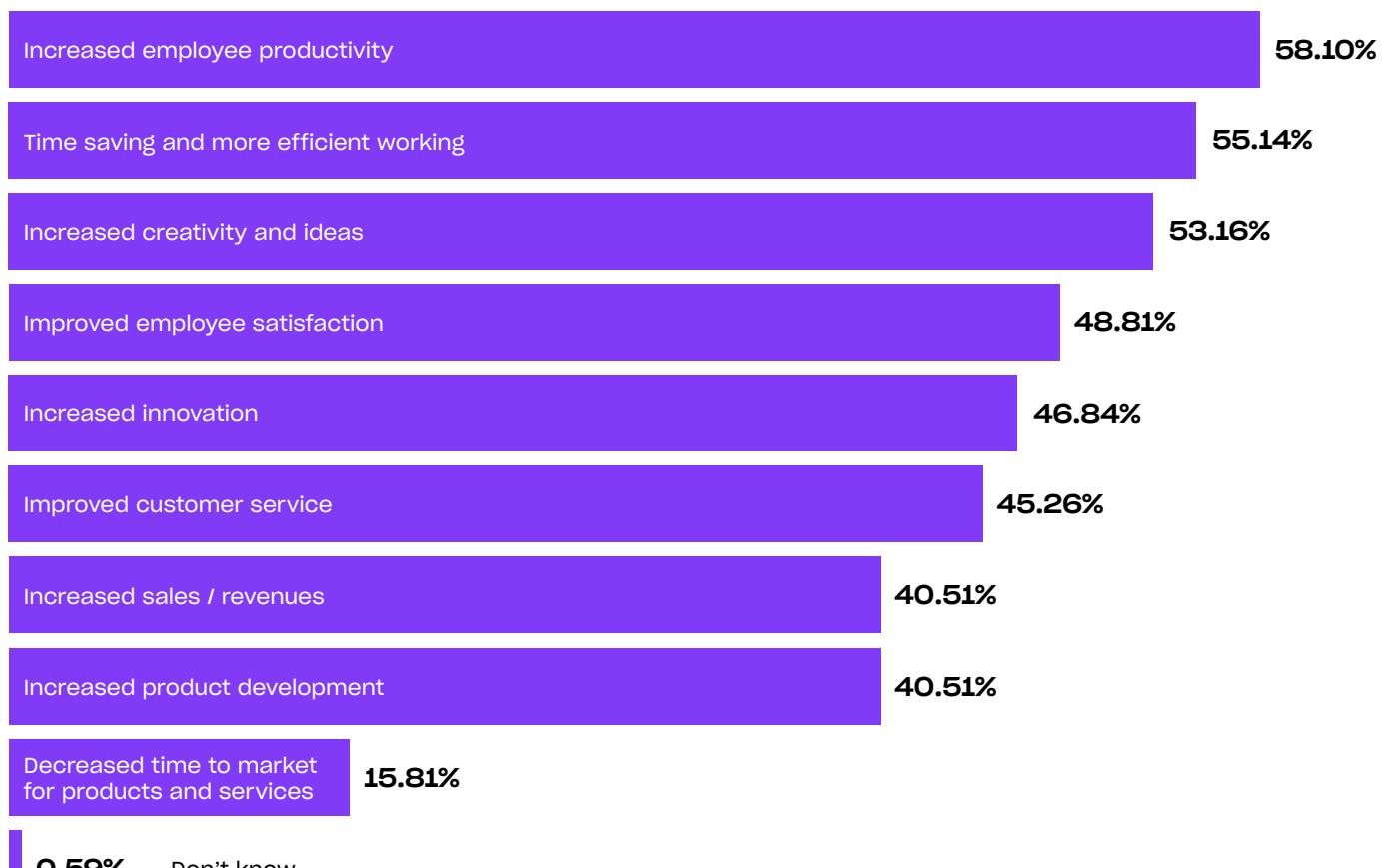


Respondents believe investing in a connected workspace will help overcome collaboration challenges by improving team culture, productivity and business results.

84% believe that investment in a connected workspace will improve the way employees in their organization collaborate (internally and externally), and 84% think that a unified workspace - that connects their content, tools and teams - would improve business results and the way teams work.



Which of the following benefits do you believe a unified workspace - that connects your content / tools / teams - would have for your organization?

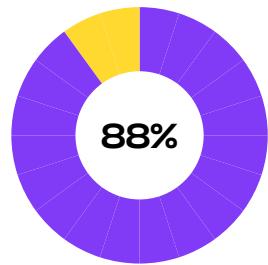


Base: respondents who believe that a unified workspace would improve business results and the way they/teams work in their organization (506)



88% think a unified workspace for teams would make work easier, better and more enjoyable. But for half (52%) there's significant or large improvements still required to implement such a workspace.

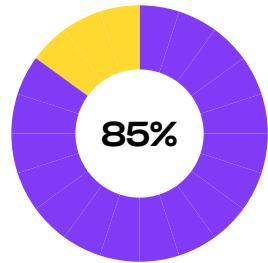
When done right though, the benefits are significant. Of those that see the positives in a connected workspace, over half (55%) predict it will create time saving and more efficient working. A similar number (49)% believe it will improve employee satisfaction, and 58% believe it will increase employee productivity.



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Think a unified workspace for teams would make work easier, better and more enjoyable

Investing in a unified workspace is also the key for unlocking innovation and improving business results:

- 82% say in order to successfully innovate, their organization must first increase investment in a workspace that unifies their content, tools and teams
- 87% think that a more unified approach to working will break down information silos that are inhibiting their organization from enhancing its collaborative culture
- 85% believe that the effective sharing of files and content on live projects is integral to employee productivity
- 86% believe that streamlining app usage will help them work smarter / quicker / easier



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Believe that the effective sharing of files and content on live projects is integral to employee productivity

The benefits of a smart workspace are clear, but, what is it? How can you use it? And what are the benefits for you and your teams?

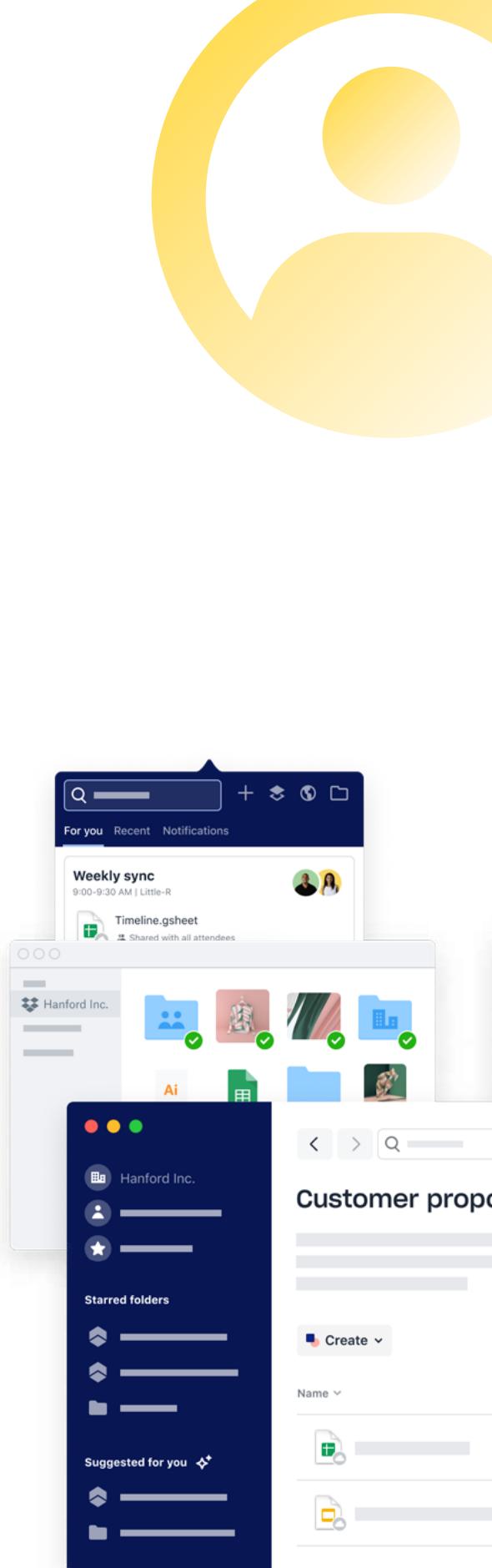


Introducing the Dropbox smart workspace

For the 55% of US business and IT leaders who think that a key benefit of a unified workspace is time saving and increased efficiency, and for the 58% who say it'll improve productivity, the Dropbox smart workspace is a place that helps you, and your teams, stay focused on the work that matters most.

Founded in 2007, Dropbox was intended as a place to store your files. But, as time's moved on, we've watched things change and shifted our approach; no longer are we just keeping files in sync — we're keeping teams in sync too with the smart workspace.

With workplace innovation the new norm, teams looking for new ways to improve the way they work are drowning in a sea of technology, turning our place of work into a cluttered and counterproductive space.





So, to fix the prod problem, we invite you to check out the smart workspace and utilize the tools you may already be using like Slack, Zoom, HelloSign, and Microsoft in a single location within Dropbox.

- Bring content and teams together in one place - Your PowerPoints and PDFs can live next to your Google docs and Airtables
- Content suggestions allow you to easily jump back into files that you're likely to need thanks to intelligently suggested files and folders based on your Dropbox activity
- Bring tools and content together like Slack, Zoom, Atlassian, Google, Microsoft Office 365 and many more
- Recent activity view allows you to stay up to date on the latest file activity and comments, with a recent-activity view that lives alongside your work, on your desktop
- Bring people together: Enable your teams to see everything going on, all the context and conversations in the same workspace
- Dropbox Spaces helps you transform how teams work together by allowing you to use one search box to search all of your content, regardless of its format or where it's saved

The screenshot shows the Dropbox desktop application interface. At the top, there's a search bar with 'Search Hanford Inc.' and various system icons. Below the search bar is a navigation bar with 'For you', 'Recent', and 'Notifications'. The main area is titled 'Your highlights' and lists several files with their status: 'Brainstorm.paper' (Opened often this week), 'Customer proposal' (Viewed 2 minutes ago), 'Reference.pptx' (Viewed 30 minutes ago), and 'Timeline.gsheet' (Viewed 1 hour ago). Below this is a 'Team highlights' section showing activity from team members, and a 'Starred' section.

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Content suggestions

This screenshot shows the same Dropbox desktop interface as above, but the main focus is on the 'Team highlights' section. It displays activity from team members: Jonathan Costa commented on 'Timeline.gsheet' 5 minutes ago, and many others are viewing 'Reference.pptx'. Michelle Wallace edited 'Design ideas.ai' 3 hours ago, and many others are editing 'Brainstorm.paper' 1 day ago. There's also a 'Starred' section at the bottom.

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Team highlights



At a time when you're under pressure to deliver digital transformation initiatives, connected teams and retaining focus is now a top priority for the business leaders we surveyed. It's clear many organizations are setting their sights on creating a more collaborative working culture, that allows mobile, remote and office based teams to work how they want.

A connected workspace, which connects your content, tools and teams is the first step. Giving people access to the resources they need to do their job, in a single location, will lead to happier, more dynamic teams, and a more productive workforce - working inside security parameters you control.

The Dropbox smart workspace is a solid step in the right direction to achieving a more collaborative working culture. Find out how Dropbox could work inside your organization [here](#).





Research methodology and scope

Dropbox commissioned independent market research specialist Vanson Bourne to undertake the research upon which this whitepaper is based.

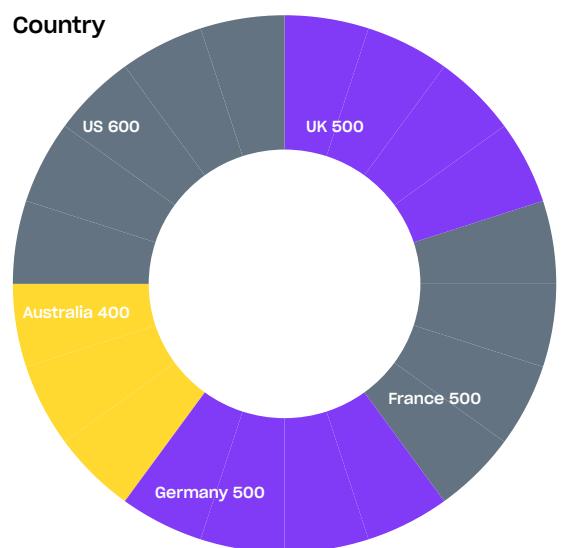
A total of 2,500 business and IT decision makers were interviewed during July and August 2019. All respondents are from organizations with 250 or more employees, and they must collaborate with at least one person on a daily basis, and also use software and applications to get their work done.



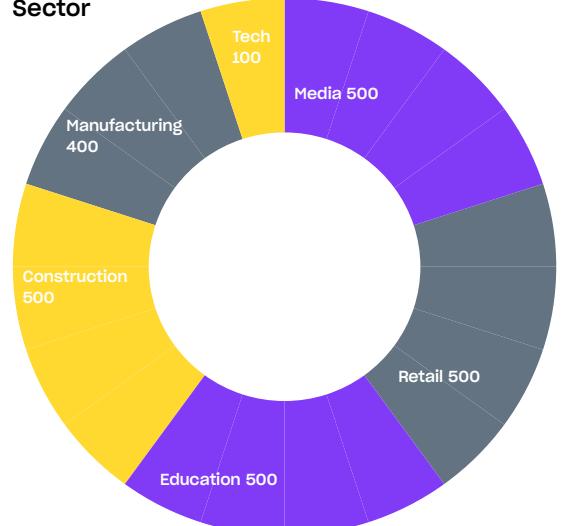
The interviews were conducted using a mixture of online and telephone interviewing, all of which were undertaken using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate. Unless otherwise indicated, the results discussed are based on the total sample.



The research included the following number of interviews in each of the below countries and sectors:



Sector



About Dropbox

Dropbox is the world's first smart workspace that helps people and teams focus on the work that matters. With more than 500 million registered users across 180 countries, we're on a mission to design a more enlightened way of working. Dropbox is headquartered in San Francisco, CA, and has 12 offices around the world. For more information on our mission and products, visit [dropbox.com/enterprise](https://www.dropbox.com/enterprise)

About Vanson Bourne

Vanson Bourne is an independent specialist in market research for the technology sector. Their reputation for robust and credible research-based analysis is founded upon rigorous research principles and their ability to seek the opinions of senior decision makers across technical and business functions, in all business sectors and all major markets. For more information, visit vansonbourne.com