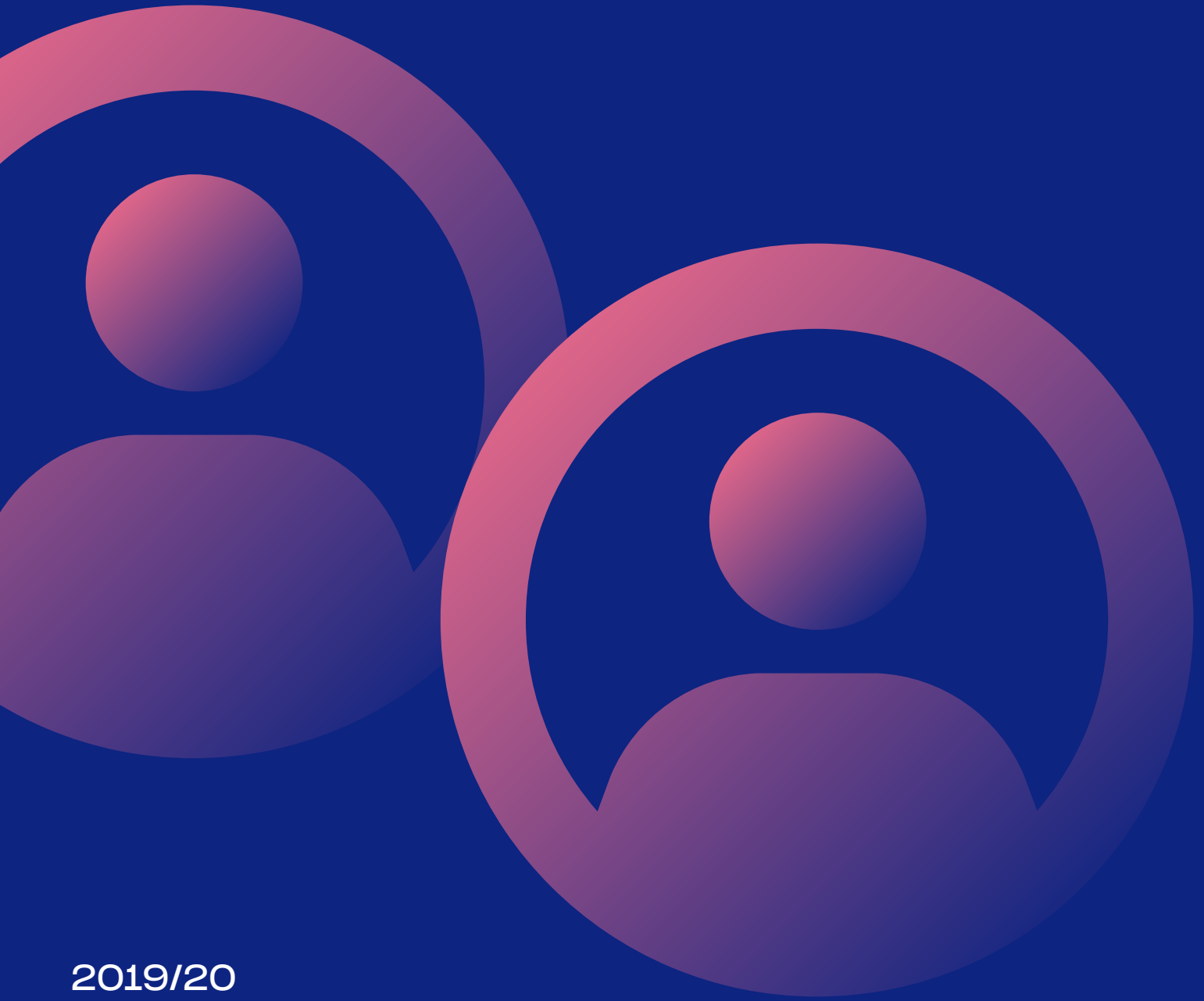


The State of Collaboration



2019/20

A global, independent survey
of IT and business leaders



Foreword

The way we work is broken.

The very technology that has helped us to advance and innovate, that has saved us time and brought us closer together, has devolved into a mess of tools that have made it difficult to focus and work collaboratively.

Just look at the typical workday now; employees are switching between an average of 35 tools¹, creating fragmentation and distractions for our teams.

At Dropbox, we're building a new vision for the way teams work together with an approach of not adding more tools, but making tools work smarter. This is critical, as employees are wasting over a quarter of their working day on tasks that don't add critical value to the business, like switching between those dozens of apps on their phones and laptops or searching for files they need.

The research we've carried out amplifies just how great a challenge business and IT leaders are facing in the workplace, but it also uncovers an incredible appetite for solutions.

And as much as the prospect of a streamlined, focused future is appealing, it's clear businesses first need to stop, hit re-start, and work with solutions that quieten down the noise of change, not add to it.

We all need a starting point so I hope you find our research both inspirational and useful, after all, we've done it for you!

Timothy Young
SVP & GM, Dropbox Core

¹<https://www.pega.com/insights/resources/demystifying-desktop-what-workforce-intelligence-reveals-about-technology-and>



Introduction

You don't need a rocket scientist to explain the changes the workplace has undergone these last ten years, as there's a chance your 'urgent to-do' list will suffice.

According to the research we've carried out, it's likely some of the biggest challenges you're facing right now are connected to the fragmented ways your teams are working today.

Achieving a collaborative way of working is key, with our respondents agreeing that getting the most out of every collaboration and giving employees the freedom and opportunity to effectively work together on tasks will add critical business value. The benefit that organisations can see if they do this successfully is enormous, and the risks that might occur if they don't are equally impactful.

This research explores the extent of the problem business leaders are facing, and the impact it's having on your peers - but also uncovers the level of focus now being placed on resolving the problem.

Unless otherwise indicated, the results discussed are based on the total sample of global respondents.

For more information on Dropbox Business, contact sales@dropbox.com or visit dropbox.com/business



Key findings

What have we learned?



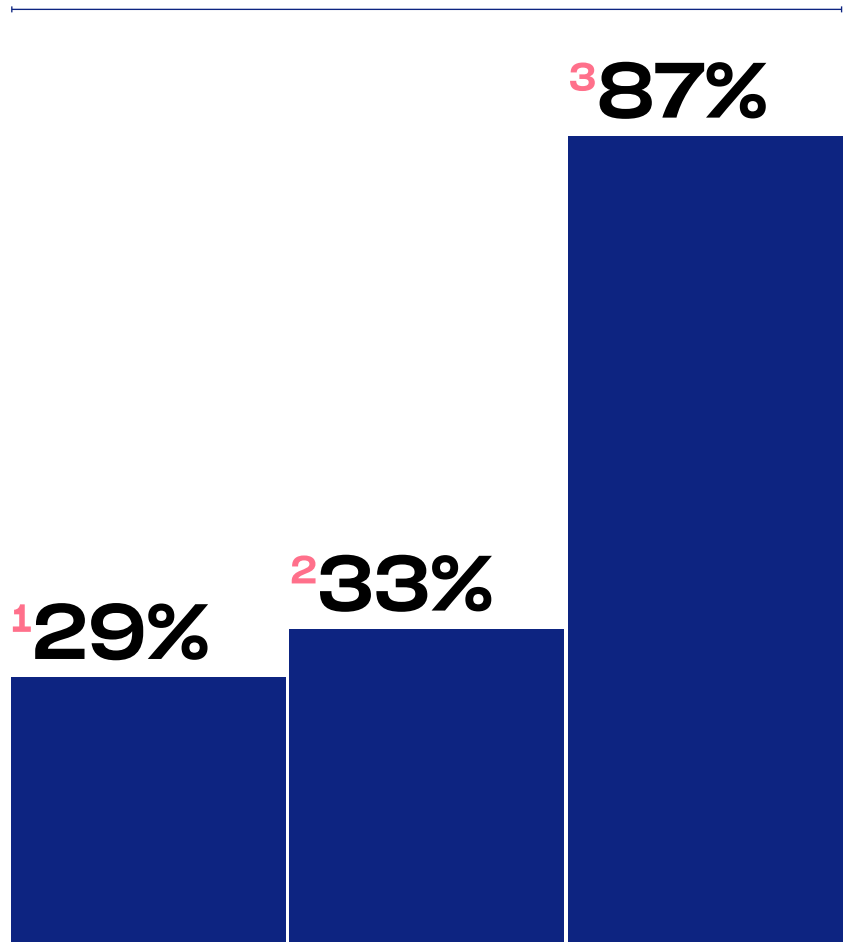
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In many organisations, the current way of working is making employees less productive. A more collaborative culture could be the solution.

¹On average, respondents believe they waste **29%** of time at work on tasks that don't add critical value

²While **33%** say that increasing employee productivity is a main priority for the next 12 months

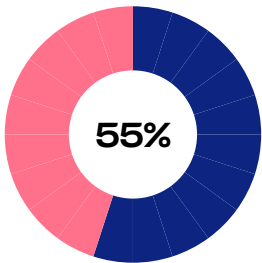
³But in order to do this, **87%** say that they need the ability to meet varying collaborative working needs of different teams



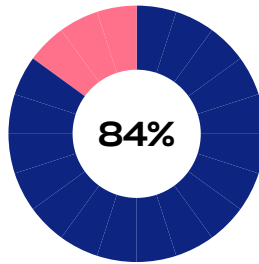


Key findings – 02

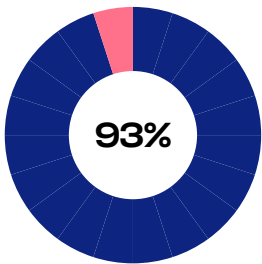
Moving towards a more collaborative working culture will not necessarily be the easiest of journeys, but it will certainly be worth the effort.



Recognising the problem is a good start – **55%** believe that significant or large improvements are needed when it comes to collaborative working across teams



This cannot go on – in fact, **84%** realise that the overall success of their organisation depends on them reinventing the way that teams collaborate

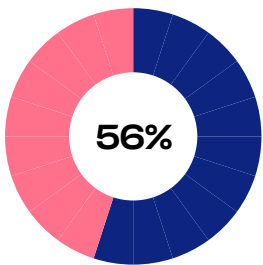


Despite the challenges that could arise as a result of this need for improvement, **93%** are still experiencing barriers to improving collaborative working, most commonly battling employee culture/attitudes

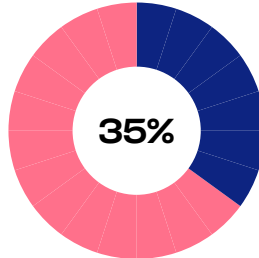


Key findings – 03

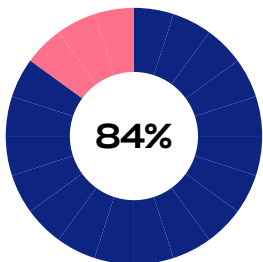
A connected workspace, which brings together people, tools content and the conversations around them, lays the groundwork of a collaborative culture, while driving the organisation forward in the process.



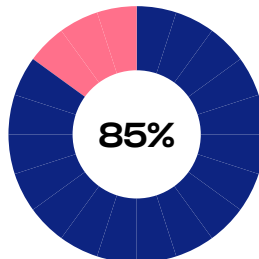
According to **56%**, significant or large improvements are required when it comes to creating a single workspace



Understandably then, collaboration tools are among the biggest investment priorities for **35%** over the next 12-24 months



It's money well prioritised for the **84%** who believe that investment in a connected workspace will improve the way that employees collaborate



This investment can be the key to overall success – **85%** say that a connected workspace connecting their content/ tools/teams would improve business results and the way that teams work



Section one: Current ways of working



There are some tasks at work that are unavoidable but that doesn't mean they should be standing in the way of the work that is truly important to the individual and valuable to the organisation.

Monotonous admin is starving businesses of innovation; it's apparent that decision makers in the modern workplace are spending too much time on administrative tasks, which is preventing them from spending time on creative activities. Could their time be put to better use?

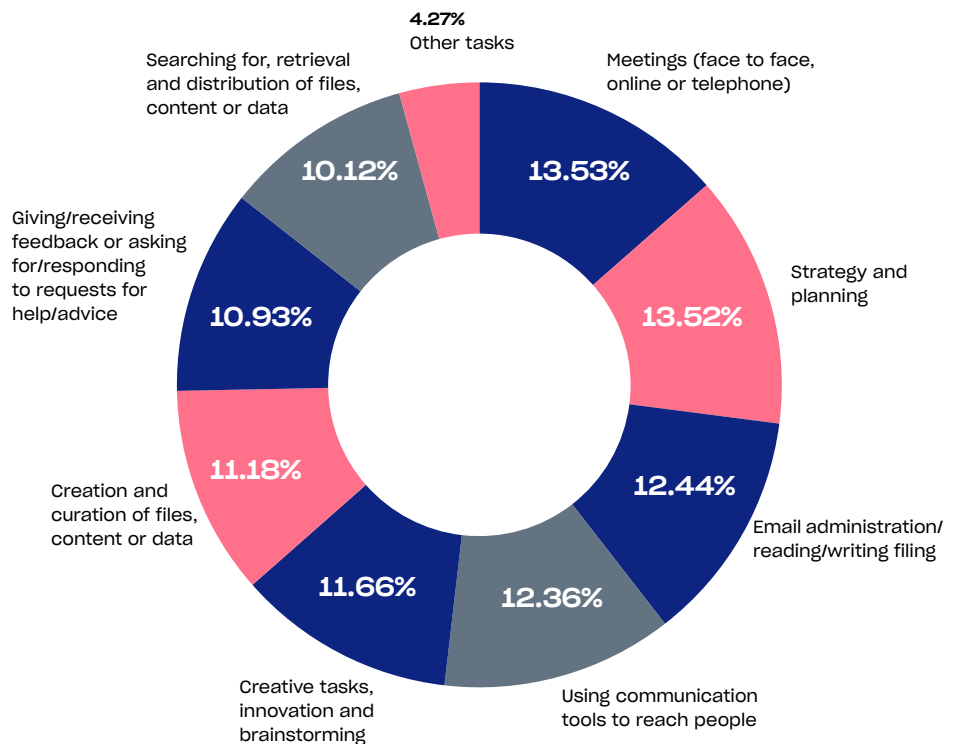
The obvious answer is yes! Innovative, creative tasks can propel an organisation ahead of even their closest competitors, so unquestionably, these should be prioritised.

On average, surveyed decision makers are spending 26% of their working day on email related tasks and meetings.

And while this is only slightly more than the proportion of time being spent on strategy, planning, creative tasks, innovation and brainstorming (25%), realistically the latter should be much higher.

Particularly when considering that other non-business critical tasks are swallowing up a further 45% of respondents' average working day.

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What percentage of your time, during an average working day, do you spend on the following tasks? asked to all respondents (2,500), excluding from the averages those who selected "Don't know" (2%)



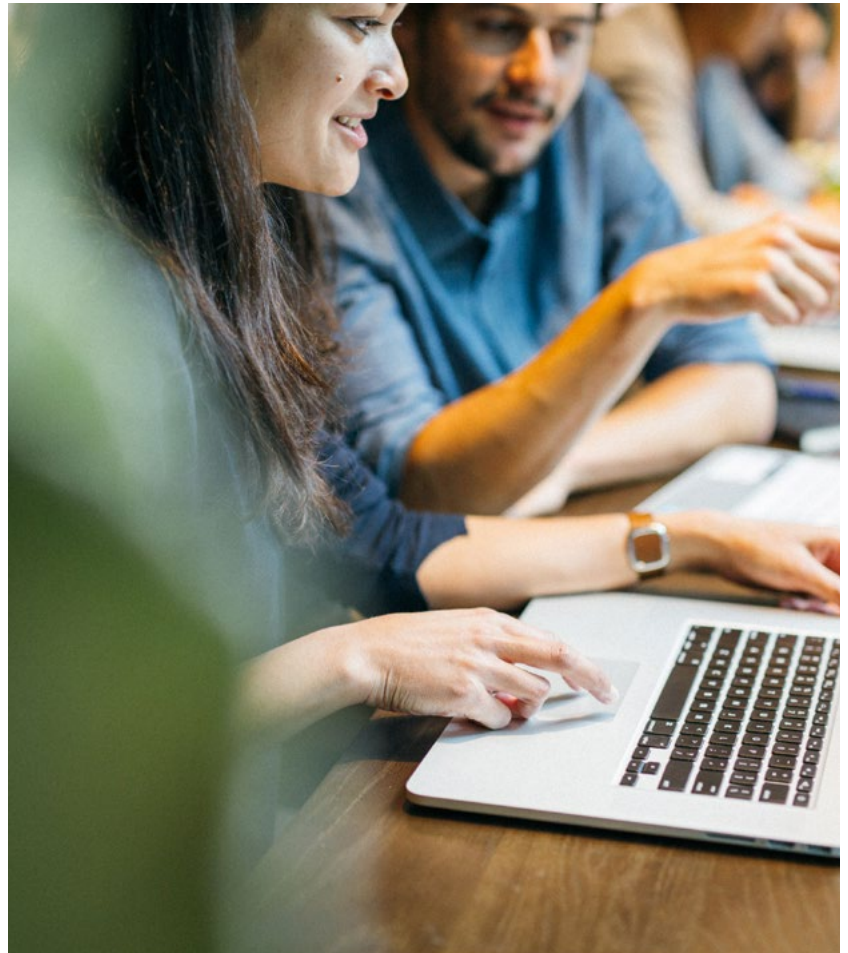


Predominantly these tasks have an internal focus as well, which indicates that tedious internal processes and practices are blocking decision makers from getting around to the work that can really benefit their organisation and its customers. Therefore, it is unsurprising that, on average, respondents believe 29% of the time they spend at work is wasted on tasks that don't add critical value to the organisation.

With decision makers being so time poor, it's of paramount importance that organisations can reduce this waste and maximise the amount of time that their decision makers are allocating toward creative and innovative activities. Do this and positive business results will follow.

Organisations have clearly identified this waste and are looking to change it – 33% of respondents report that increasing employee productivity is among the main priorities for their team over the next 12 months.

One approach to addressing this challenge, is to achieve a better understanding of the workforce and meet their needs. Approaching nine in ten (87%) say that if they hope to maximise productivity, then they need the ability to meet the varying collaborative working needs of different teams. A clear message then – collaborative working is going to be a big part of the productivity puzzle.



There are so many upsides to implementing a collaborative working culture, and the businesses who recognise this and take timely action to encourage it, will find themselves ahead of those who fail to recognise its importance.



Another good starting point would be to help employees effectively share relevant information on live projects – 84% agree that this is integral to employee productivity in their organisation.

Simplifying the way in which employees and teams work is another area that will almost certainly aid collaboration and therefore productivity. This is a key priority for 28% of respondents' departments over the next 12 months, indicating that, while there is further work to do for many, it is on the radar of these businesses.

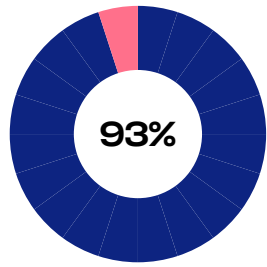
And it is critical that they do find a solution because 85% of surveyed decision makers agree that streamlining tool and app usage will help them to work smarter. These types of improvements will not only benefit productivity but can also have a positive knock-on impact for employee satisfaction and morale.

Undeniably, organisations have productivity and simplification issues that need to be addressed and this means that they can't afford to ignore the importance of good collaborative working any longer.



←
33% of respondents report that increasing employee productivity is among the main priorities for their team

Section two:
**Collaborative
working –
the need to
do it better**



Report their organisation is still encountering barriers when it comes to improving collaborative working

Given the aforementioned productivity and simplification difficulties that organisations are looking to tackle, it is no wonder that solving the collaboration dilemma is fast becoming a top priority for many.

According to nearly a third (30%) of respondents, working more collaboratively with colleagues in their own team is among their department's top three priorities over the next 12 months, while well over half (55%) believe that significant or large improvements are required when it comes to collaborative working internally and externally across all teams. These organisations must rectify their situation – collaboration is a force for good, without it, many organisations struggle.

A case in point is almost four in ten (37%) cite employee productivity as being among the areas to have suffered most as a result of collaboration difficulties, while a similar proportion (34%) point toward employee satisfaction/morale as an area to have taken a hit. But it doesn't stop there, with 24% placing customer service among the most affected areas and the same proportion citing innovation.

If these impacts continue working in tandem with each other then it could prove very serious for businesses with poor collaborative practices, but if these issues can be ironed out then the impacts are all avoidable.

Considering the potential consequences, it is almost unbelievable that the vast majority (93%) report their organisation is still encountering barriers when it comes to improving collaborative working.

Culture and employee attitudes can often be difficult to change, but with this being the most common barrier (36%) more can be done to showcase the benefits of collaborative working to the business, and more importantly, the staff themselves. Just over two thirds (68%) of respondents believe that colleagues in their own department need to place more importance on collaborative working, with slightly fewer (65%) saying the same for colleagues in other departments or teams.



And what is truly eye-opening, is the 22% of respondents who report that the c-suite in their organisation do not see collaborative working as a key business driver. These organisational leaders should have total visibility over areas such as productivity, employee morale, customer service, and innovation, and as a result should be in the best position to see how great collaborative working can directly impact each one.

Most respondents have already made this connection and are looking for top down encouragement, with 83% believing that the c-suite should place more emphasis on the importance of good collaborative working.

While many recognise that various departments need to increase the significance placed upon collaborative working, it seems that getting this message across is the tricky part.

Just 13% report that no single department is responsible for creating a more collaborative working culture and that everyone plays a role, while 40% are happy to say that this responsibility sits with the IT department.

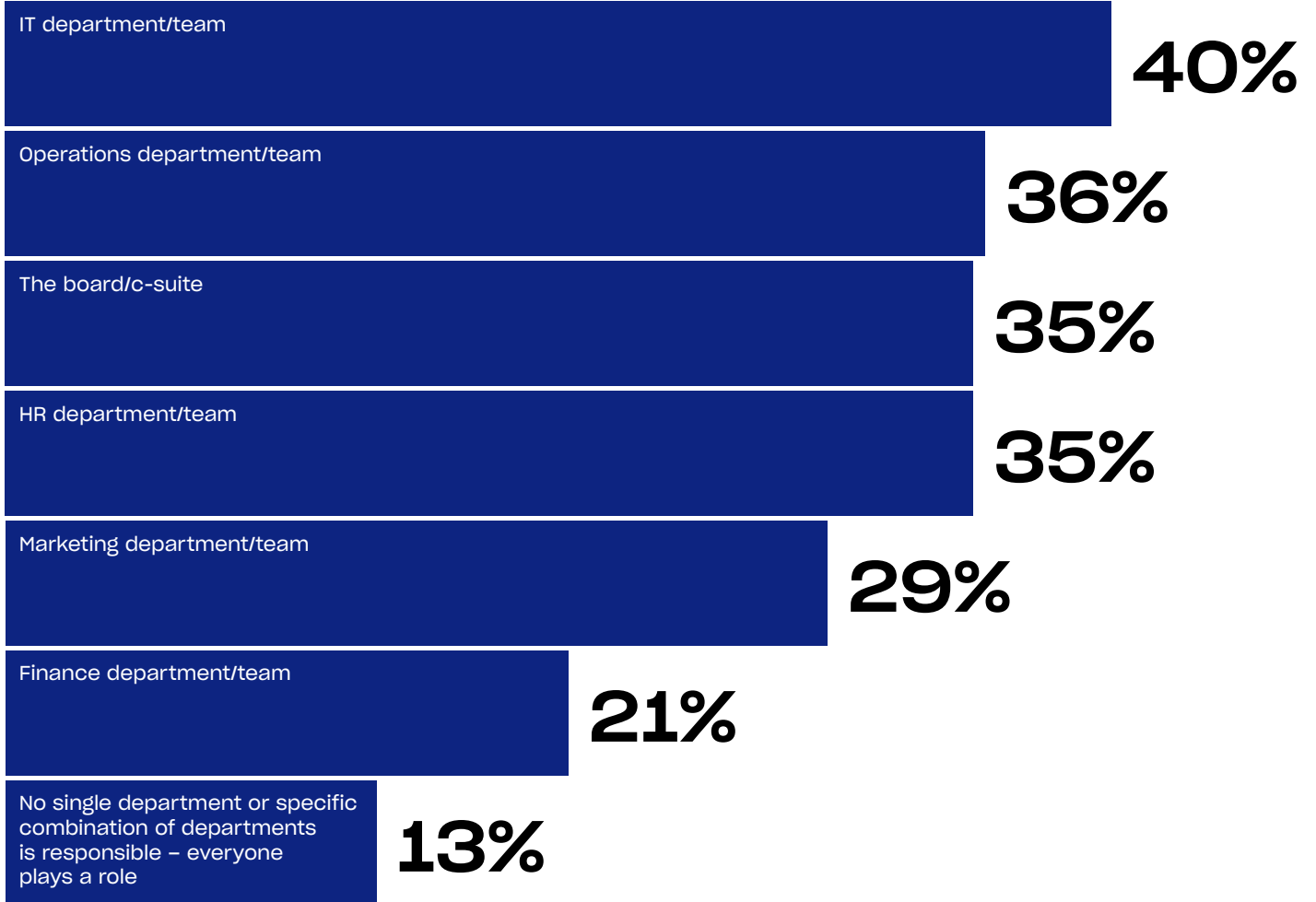
This attitude contradicts the very definition of collaboration. Technology will undoubtedly play a huge role in a successful transition to implementing a more collaborative culture, but putting this on the shoulders of one, or even two departments, is not going to provide the results that organisations need to see.

No matter how businesses get there, the journey will be worth the reward – 84% of surveyed decision makers agree that the overall success of their organisation depends on them reinventing the way that teams collaborate both internally and externally.

The business case is crystal clear. For those who are yet to enter the race for better workplace collaboration, there is no time like the present, and for those encountering difficulties, the benefits will be worthwhile. You could even say that the future of the business depends on it.



“Which departments/teams do you believe are responsible for creating a more collaborative working culture in your organisation?”
asked to all respondents (2,500)





Section three: Building a connected workspace for the future



- How can my organisation eliminate the issues we have experienced as a result of sub-standard collaboration?
- How can we overcome the barriers that are preventing us from implementing a collaborative working culture?
- How can we extract more value from our collaborations?

All are valid questions and the answers can be broken down into three key areas – people, processes and technology.

We have seen that tedious internal processes and tasks are dragging decision makers away from the work that they should be doing. And it has also been shown that employee culture is an issue, coupled with the fact that various organisational areas are not placing enough importance on collaboration.

There is though, a desire for simplified workflows. So, the answer to all the above problems may lie with the technology.

Currently, 56% of surveyed decision makers believe that significant or large improvements are required when it comes to creating a single workspace that unifies their content, tools and teams.

This provides a starting point – things aren't perfect, but organisations are looking to make a change.

More than a third (35%) report that collaboration tools are among their organisation's biggest investment priorities over the next 12-24 months, which is only slightly under the proportion prioritising information security (36%).



And this is exactly the level of importance that businesses must continue to place on collaboration tools if they hope to reap the rewards – and those rewards are significant.

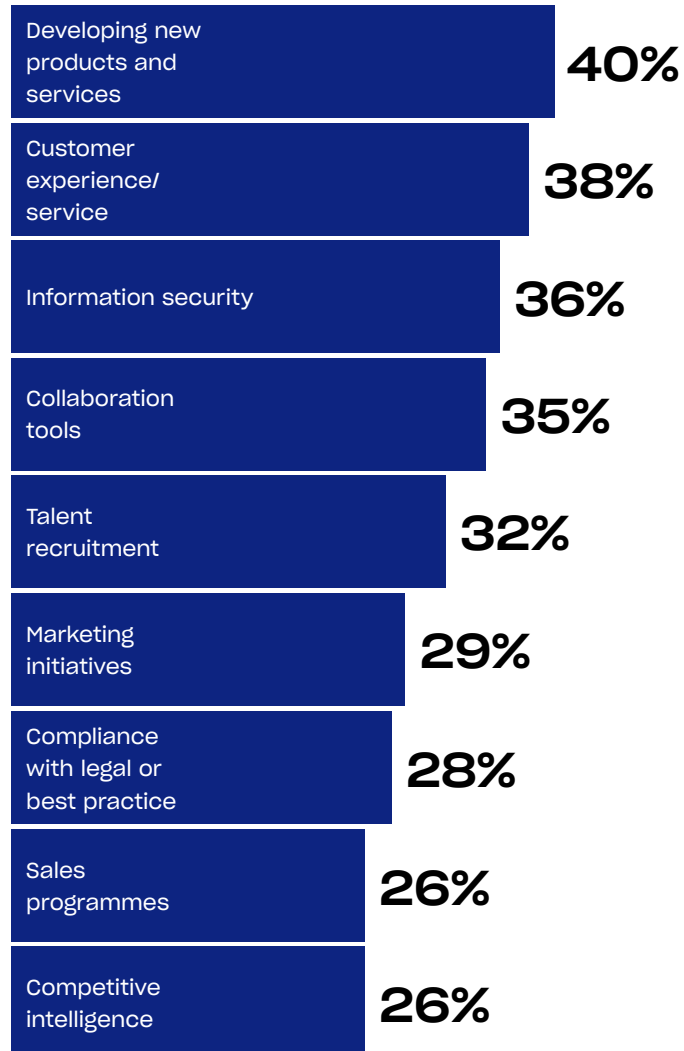
More than eight in ten (82%) believe that in order to successfully innovate, their organisation must first increase investment in a workspace that unifies their content, tools and teams. Innovation is being restricted by monotonous admin, and here lies a possible solution.

Further to this, 86% agree that a connected workspace for teams would make work easier, better and more enjoyable. This will help to address the employee culture difficulties that many have been experiencing. So, people and process related challenges can be minimised by using a connected workspace, but what about specifically improving collaboration?

A connected workspace has the answers here as well, according to the 84% who believe that investment in such a workspace will improve the way that employees at their organisation collaborate internally and externally.

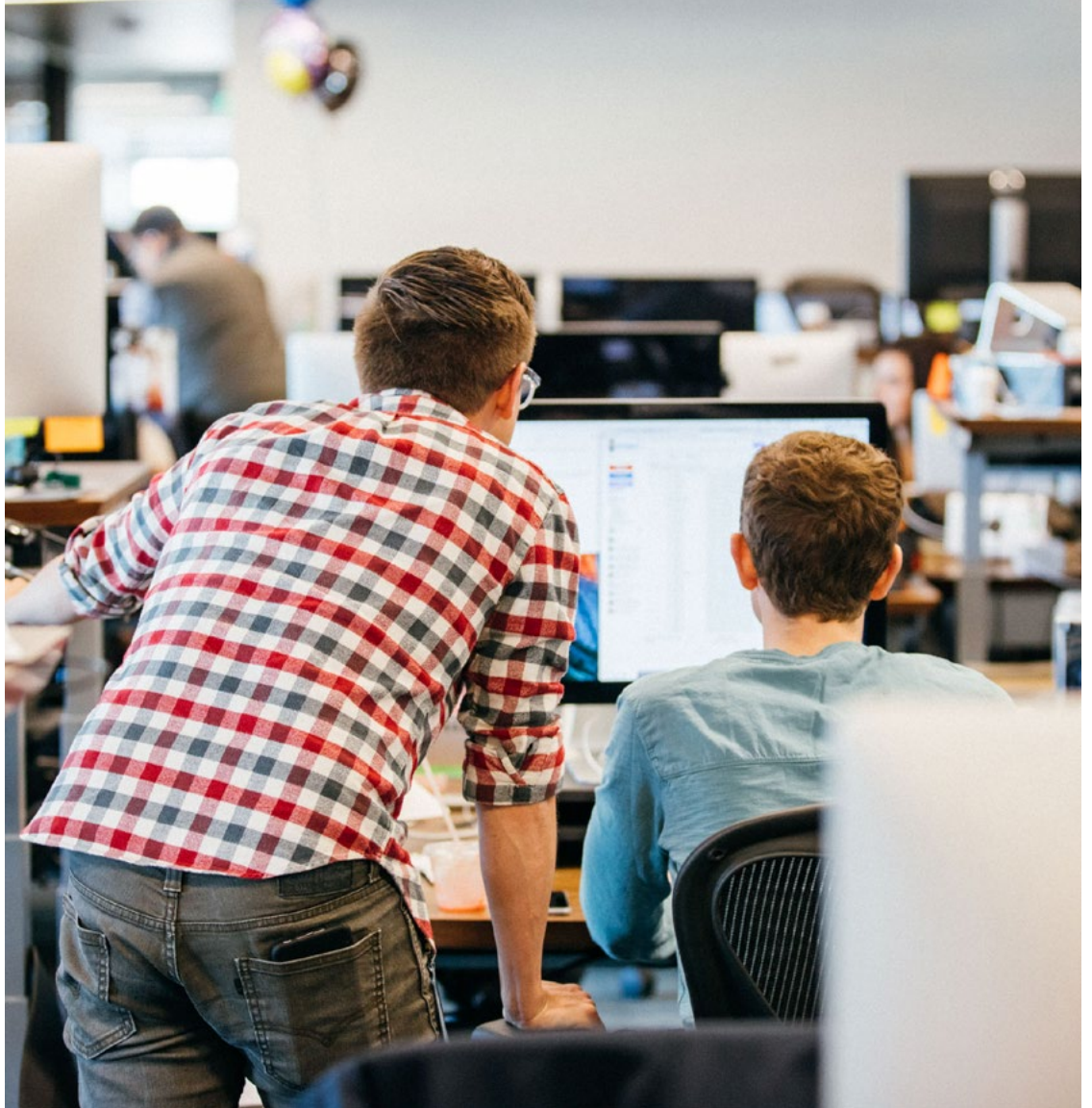


“Which of the following are the biggest investment priorities for your organisation over the next 12-24 months? Combination of responses ranked first, second and third”
asked to all respondents (2,500)





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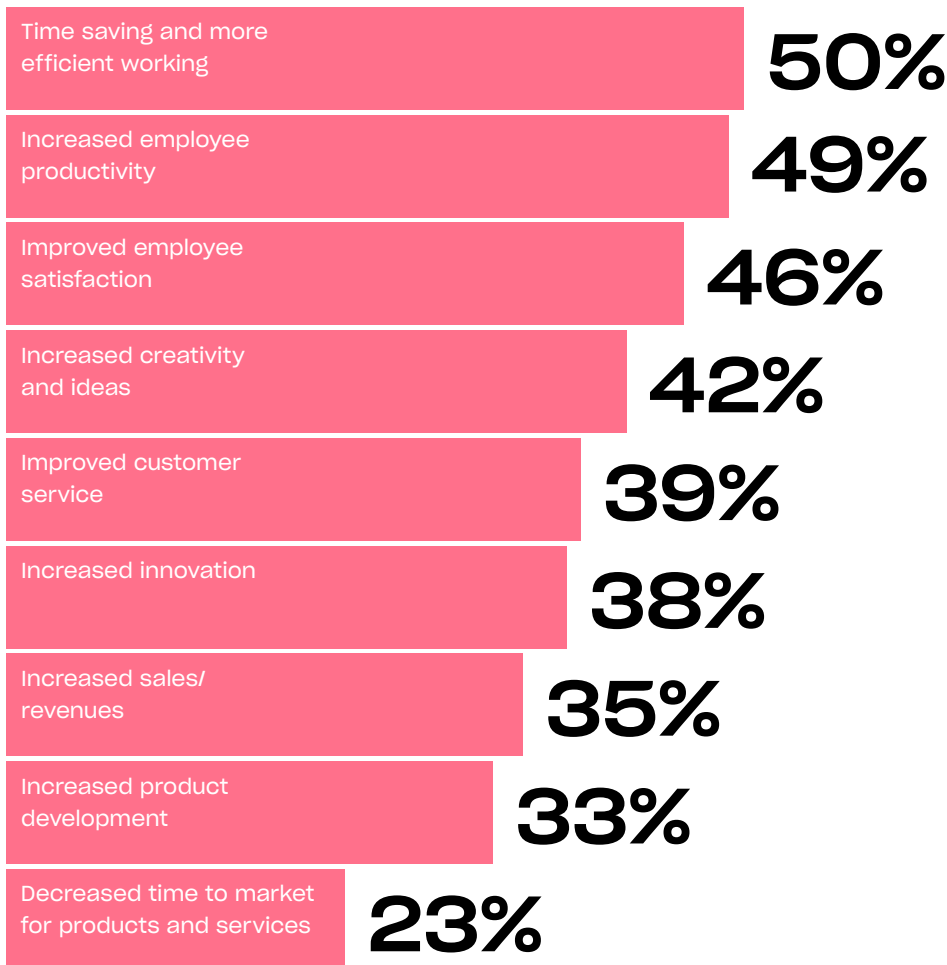




In addition, 83% think that a more unified approach to working will break down information silos that are inhibiting their organisation from enhancing its collaborative culture. Information silos are not conducive to good collaboration and often cause a whole host of other difficulties, which now makes it clear why so many have witnessed missed deadlines, opportunities and employee tensions as a result of poor collaboration.

And if any further endorsement is needed for a connected workspace, then there is always the 85% of surveyed decision makers who believe that business results and the way that teams work in their organisation would be improved through the use of a connected workspace that connects their content/tools/teams.

Of those who believe this, 50% expect to see time savings and more efficient working as a result, while 49% anticipate increased employee productivity. With such a productivity crisis in organisations, these business benefits are too good to be ignored. Furthermore, 46% predict improved employee satisfaction, while substantial proportions foresee increased creativity and ideas (42%), and increased innovation (38%). It is clear then, that a connected workspace can reach all corners of the business.





Conclusion

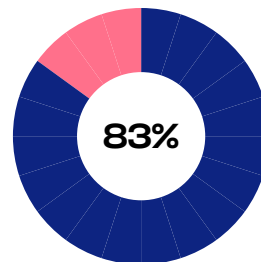
Organisational value and time is being lost by decision makers spending significant time and effort on non-critical tasks, tasks that do not add value to the organisation. At a time when you're under pressure to deliver digital transformation initiatives, strategy and planning is being pushed aside in place of email, admin and other monotonous tasks.

Connecting teams and retaining focus is now a top priority for the business leaders we surveyed, with many organisation now setting their sights on creating a more collaborative working culture, that allows mobile, remote and office based teams to work how they want.

Organisational change though is regularly met with resistance from employees, and it's important to remember that increasing collaboration is no different. You as a leader must find a way to demonstrate the importance and value of best-in-class working practices; for employees, the business, and your customers.

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

Benefits like these offer business impact and an opportunity to fix the broken workplace. Surely, a connected workspace is too good to ignore?



← **83%** think that a more unified approach to working will break down information silos that are inhibiting their organisation from enhancing its collaborative culture





Research methodology and scope

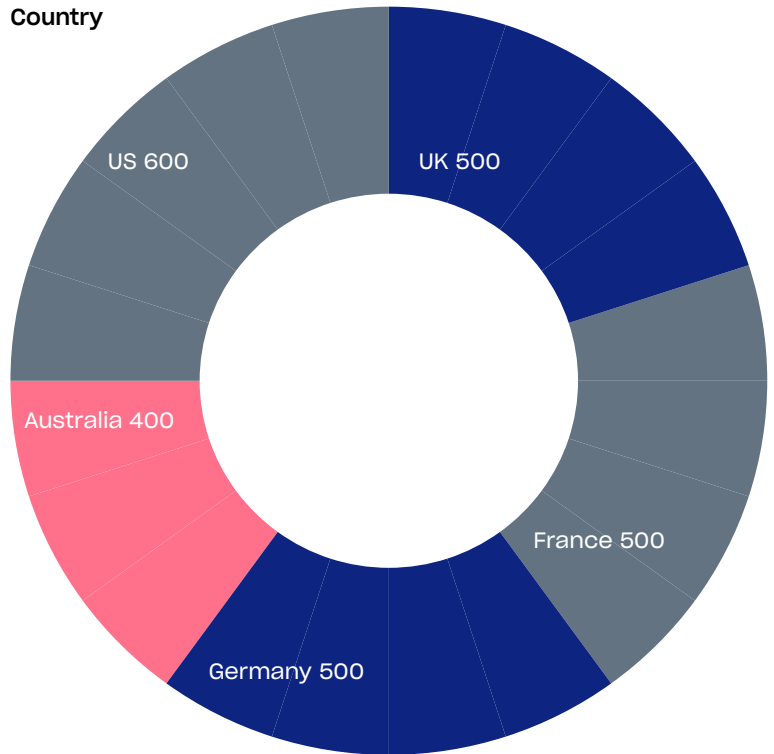


The research included the following number of interviews in each of the below countries and sectors:

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

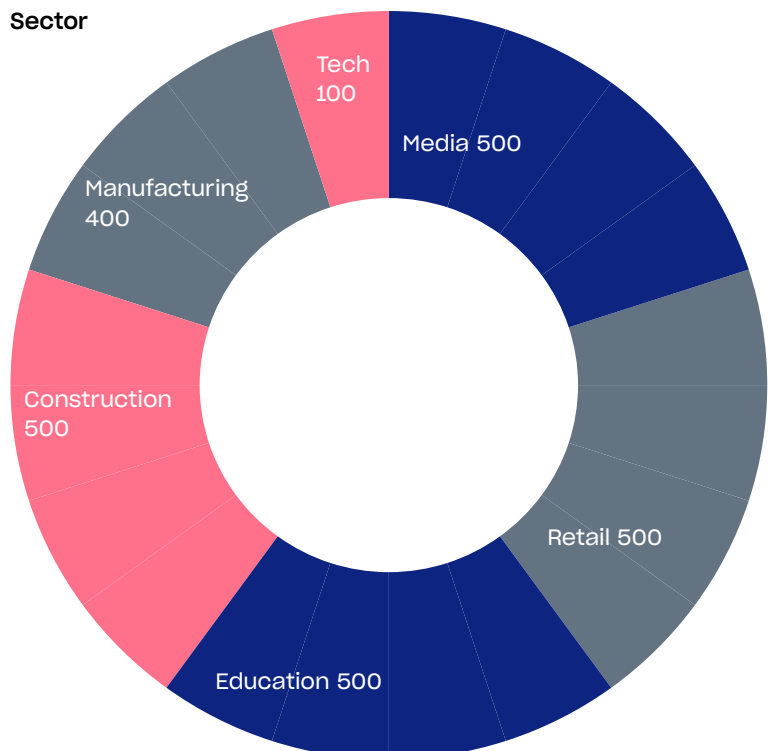
A total of 2,500 business and IT decision makers were interviewed during July and August 2019. All respondents are from organisations with 250 or more employees, and they must collaborate with at least one person on a daily basis, and also use software and applications to get their work done.

Country



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.

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

Vanson Bourne

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