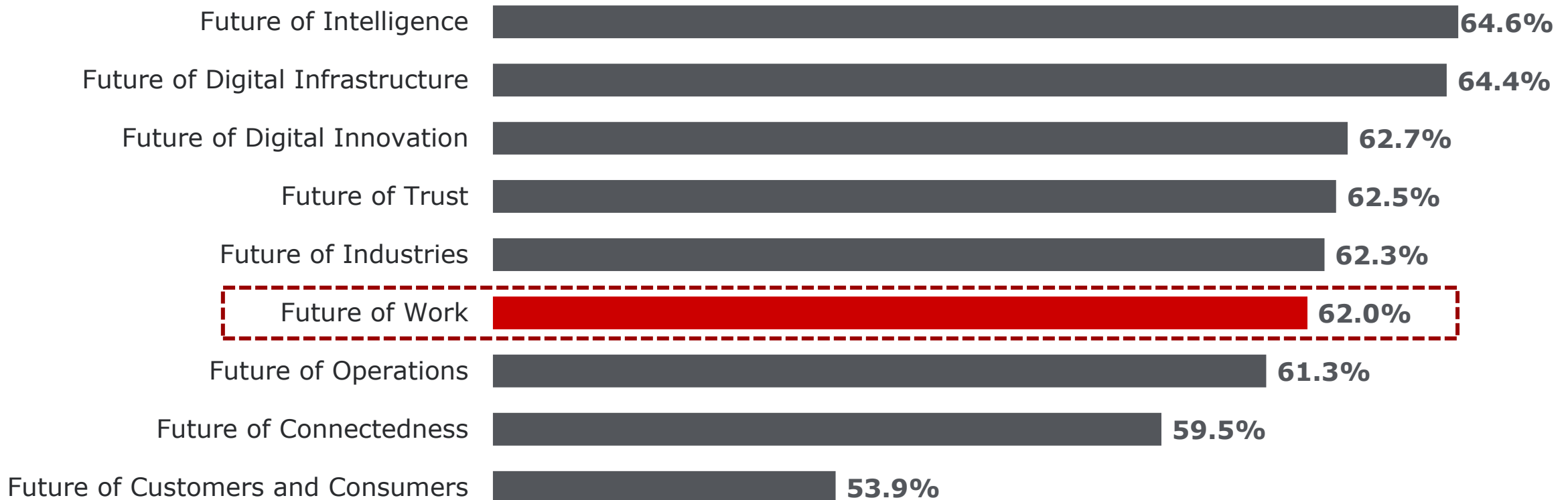




**MONDAY**

# THE FUTURE OF WORK WAS ALREADY A 5-YEAR PLANNING PRIORITY FOR CEOs IN JANUARY/FEBRUARY 2020

Percent of CEOs rating these agenda items in January/February as more or significantly more important in next 5 years



# SHOCK TO THE SYSTEM: THE FUTURE OF WORK IS SUDDENLY THE “NOW” OF WORK

## SHIFT TO WORK FROM HOME

### BEFORE THE PANDEMIC

ONLY 16% OF EMPLOYEES WORKED FROM HOME AT LEAST 60% OF THE TIME



THAT NUMBER HAS JUMPED TO

# 78%

SINCE THE INSTITUTION OF SOCIAL AND WORK RESTRICTIONS

SOURCE: IDG Survey of Technology and Security Executives, March 19-23, 2020

# SIGNIFICANT SECURITY CONCERNS EMERGE FOR WFH ATTACKS

**61%**

express greater concern about attacks targeting WFH employees since the institution of social and work restrictions sent mass employees to WFH



**49%**

FINANCIAL SERVICES



**73%**

HEALTHCARE



**57%**

HIGH TECH

SOURCE: IDG Survey of Technology and Security Executives, March 19-23, 2020



**TUESDAY**

# RECENT EVENTS HAVE PERMANENTLY CHANGED HOW WE WORK

The current WFH shift has created a more positive view of remote workplace policies and will likely impact how we plan for office space, tech staffing and overall staffing in the future



71%

Our technology infrastructure was prepared to adequately address employees working from home (WFH)



68%

Our technology support systems (infrastructure, operations, help desk, security, etc.) were prepared to address new business shifts in overall IT consumption



65%

The effects of the pandemic are accelerating our digital transformation efforts



61%

The current WFH shift has forced the creation of new, more efficient and potentially lasting workflows and processes



58%

We anticipate our supply chain will see continued disruptions, impacting our ability to innovate



52%

Our crisis/ pandemic/ resiliency planning process prepared us for the current situation



49%

We needed to acquire new technology solutions/services in order to address the new work dynamic



44%

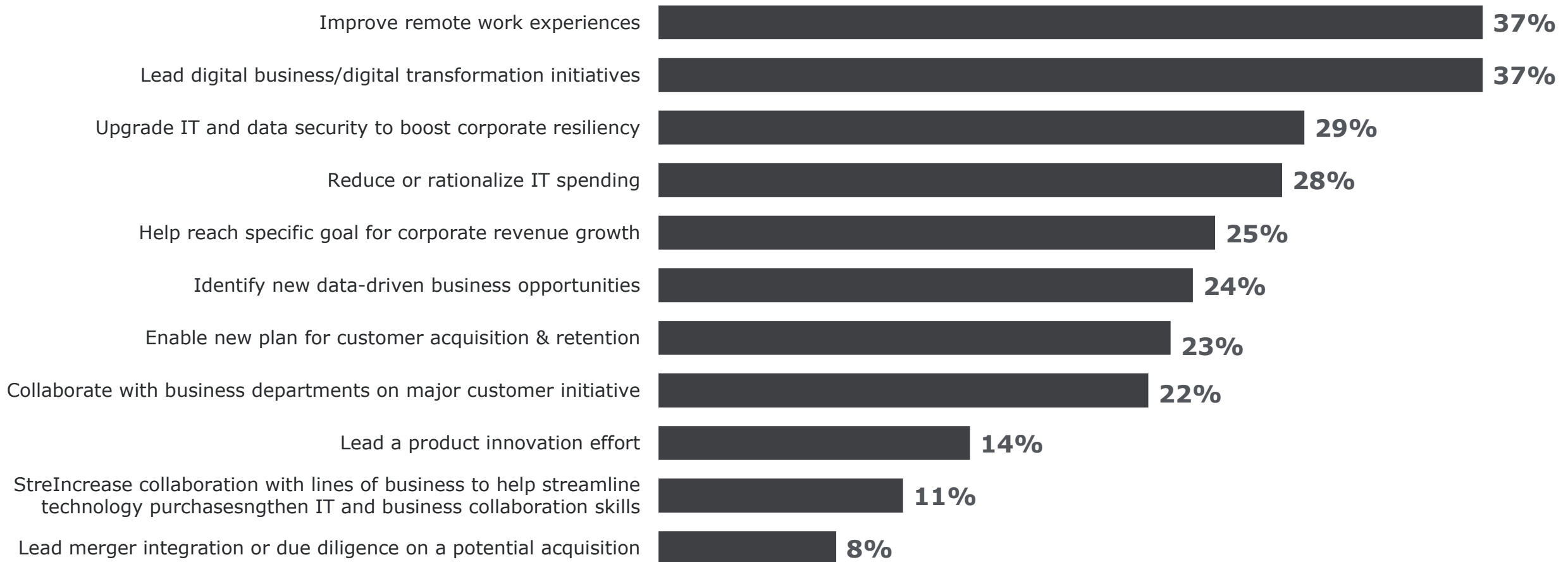
The pandemic is increasing my/my team's involvement in the creation of new revenue-generating initiatives



40%

On a scale of 1 to 5 how strongly do you agree/disagree with the following statements? (Showing Strongly Agree/Agree)

# IMPROVING THE REMOTE WORK EXPERIENCE IS NOW THE CEO'S TOP PRIORITY FOR TECH LEADERS



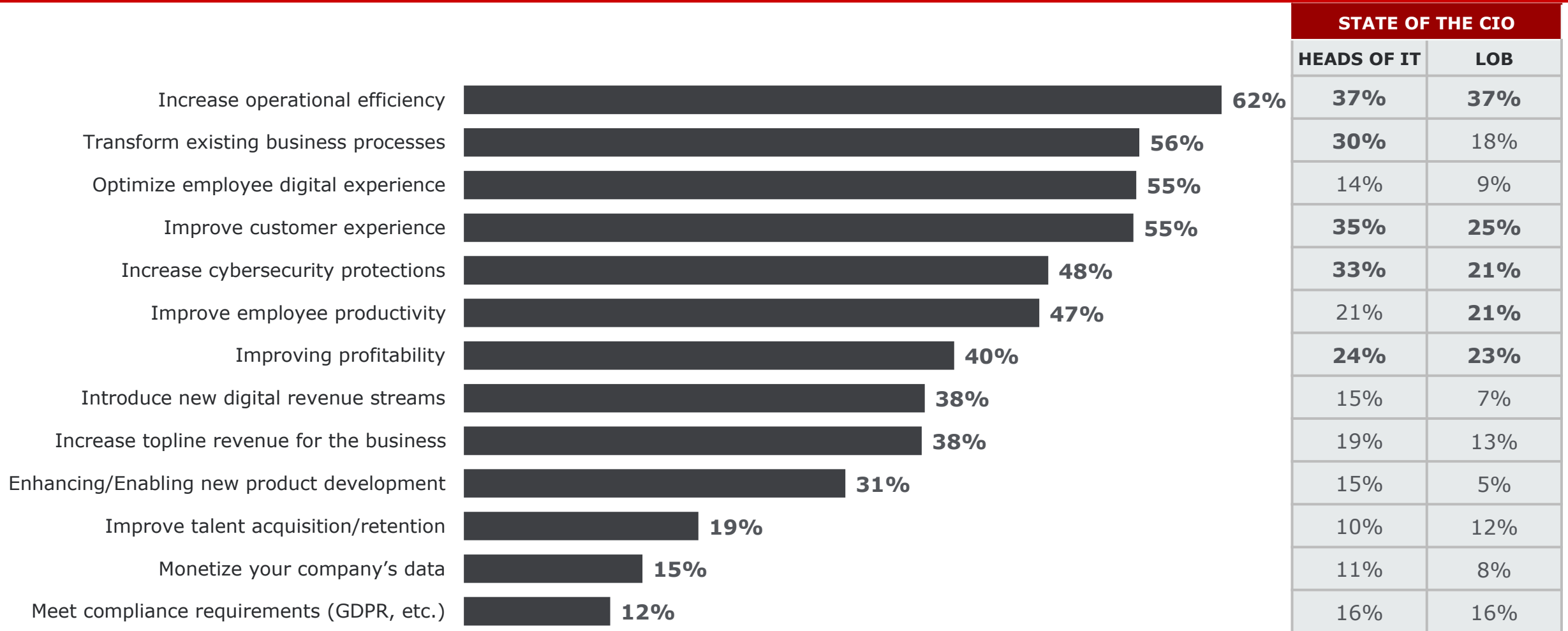
Q. Given the current state of the business what are the CEO's top three priorities for you to help the business persevere through the current disruption?



**WEDNESDAY**



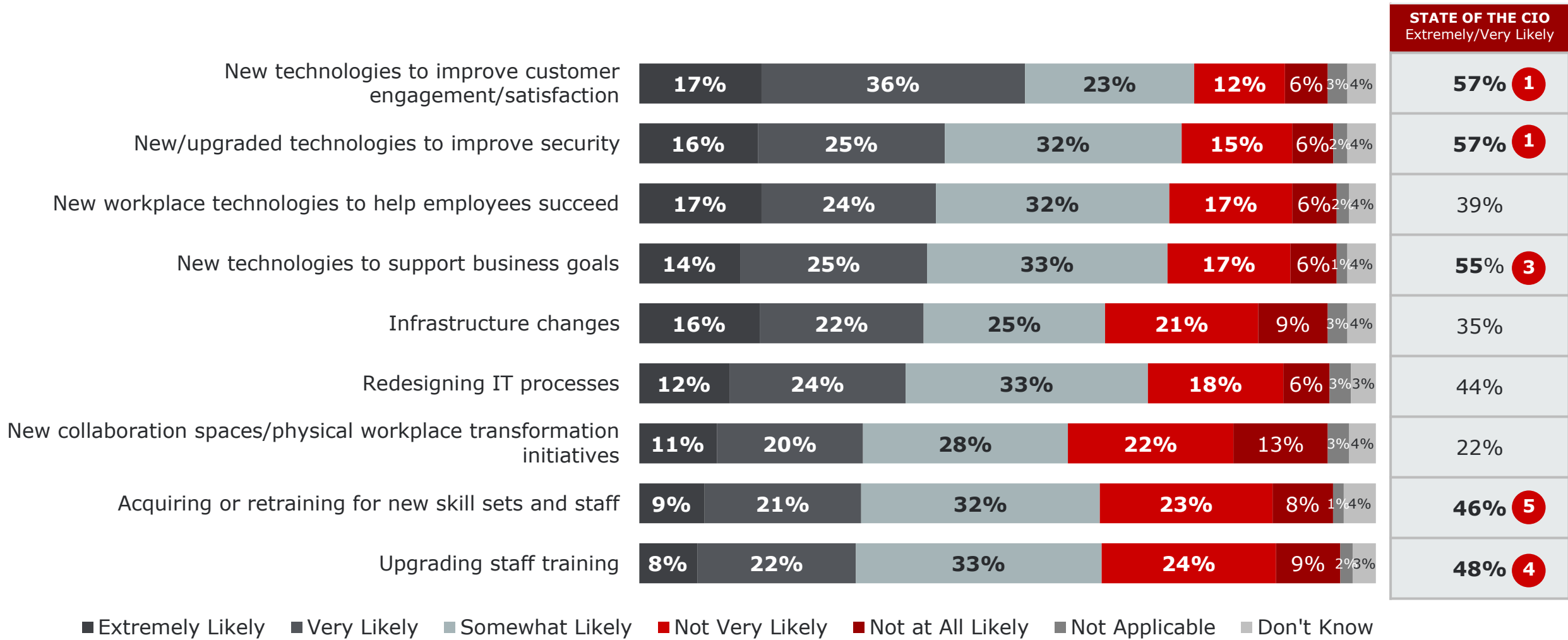
# EFFICIENCY, BUSINESS PROCESS, AND EMPLOYEE/CUSTOMER EXPERIENCE ARE THE NEW TOP PRIORITIES



Q. How has the pandemic impacted the way your organization is prioritizing the following business initiatives? (Showing Increased Priority);

Q: In 2020, which of the following business initiatives will be most significant in driving IT investments at your organization?

# CUSTOMERS WILL BE A TOP REINVESTMENT AREA FROM EFFICIENCY SAVINGS IN THE NEW ECONOMY

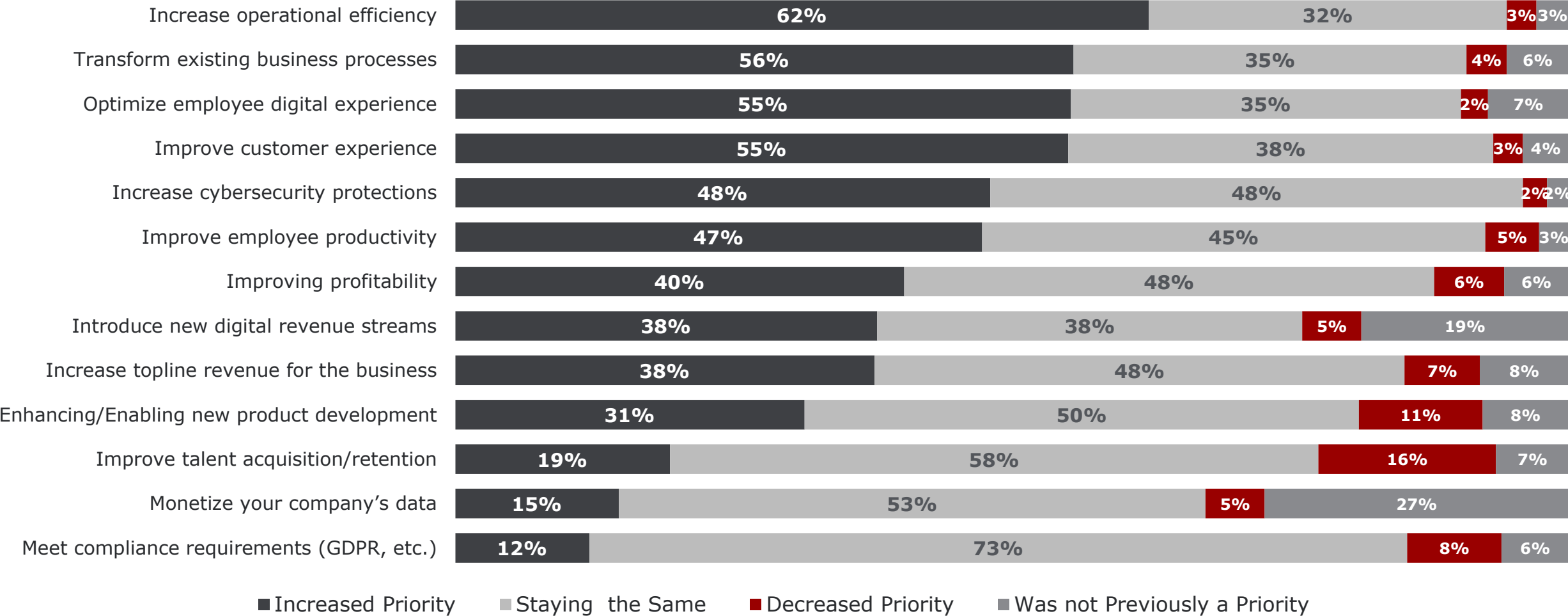


Q. If your organization realizes cost savings from IT efficiency measures and/or technology strategy over the next 12 months, how likely are you to reinvest that cost savings in the following? (Select one answer per row.)



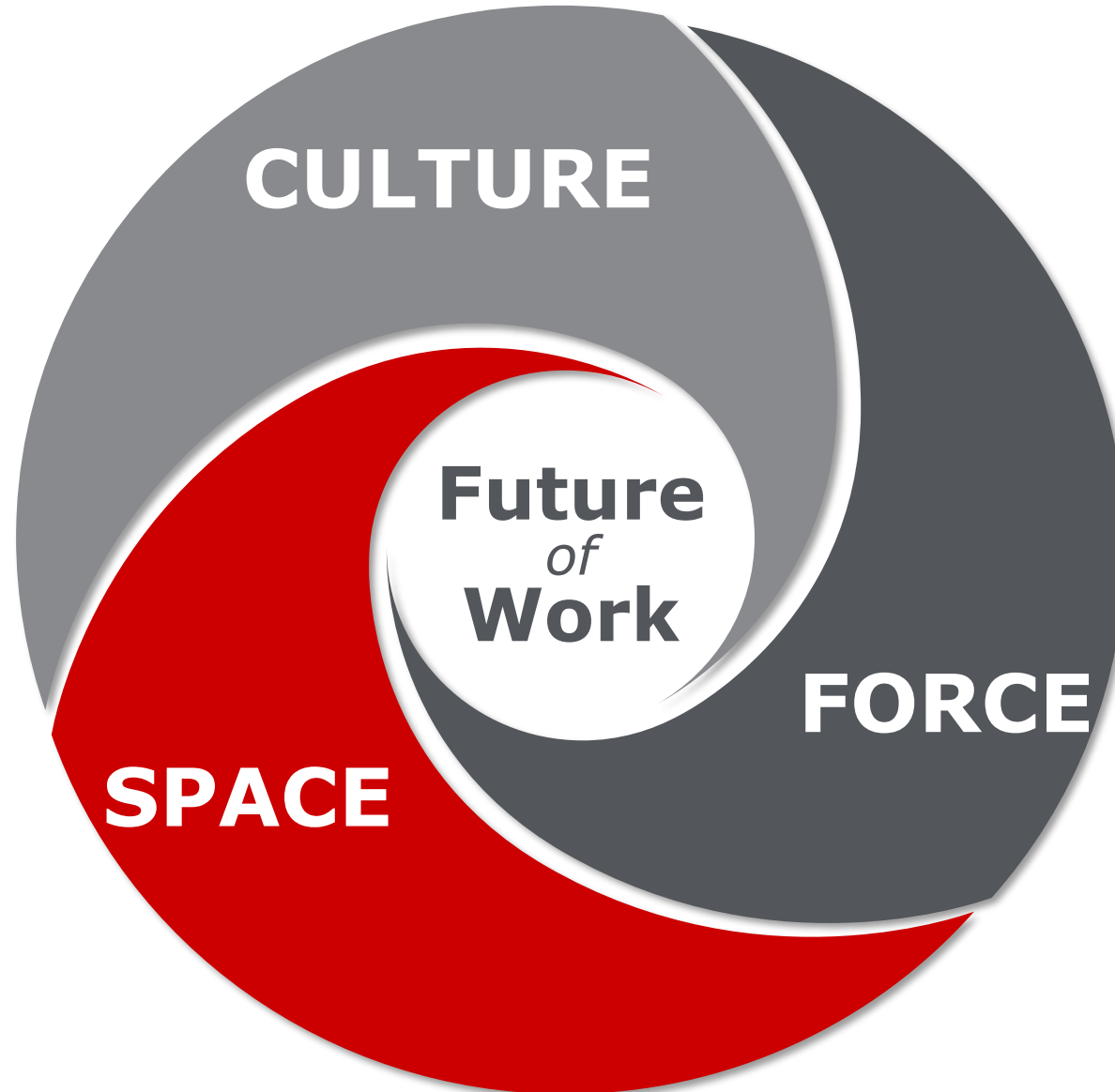
**THURSDAY**

# ORGANIZATIONAL PRIORITIES HAVE SHIFTED TO EFFICIENCIES, PROCESSES AND EMPLOYEE EXPERIENCE



Q. How has the pandemic impacted the way your organization is prioritizing the following business initiatives?

# THE NOW OF WORK IS AN EVOLUTION OF CULTURE, WORKFORCE AND WORKSPACE





**FRIDAY**

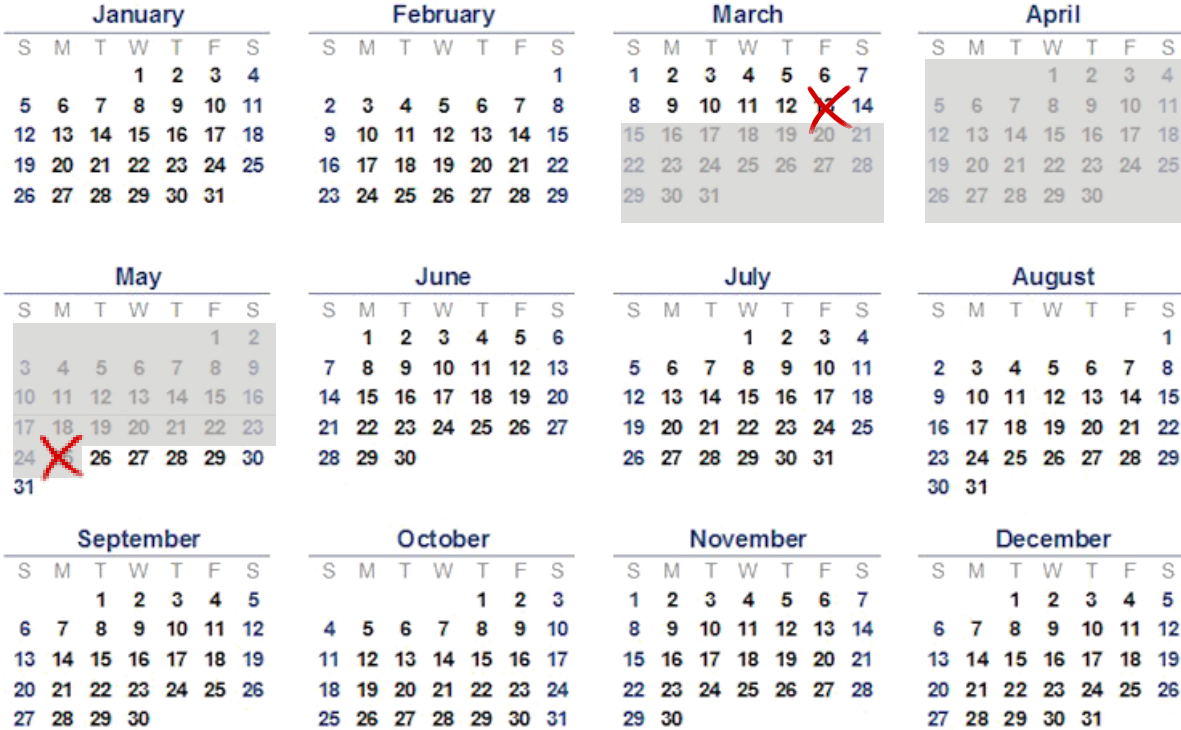
# NEARLY 30 PERCENT OF TECH LEADERS SEE AN EXTENDED HORIZON TO LIFTING SOCIAL AND WFH RESTRICTIONS

Anticipated length of social and work restrictions	Response Percent
4-6 weeks	5%
6-8 weeks	16%
8-10 weeks	20%
10-12 weeks	30%
More than 12 weeks	29%

Average anticipated duration of social and work restrictions

# 10.2 weeks

## 2020



Q. Starting with March 13th when social distancing guidelines were widely announced in the United States, how many weeks in total do you expect social and work restrictions resulting from the Coronavirus (COVID-19) pandemic to remain in place?