



Our approach to the future of work



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Unlocking the future of work

Foreword by Dr Nicola Millard

Over the last year, organisations around the globe rose to a challenge that no one could've ever truly predicted or prepared for. But it's in times of crisis that we learn what we're really capable of; what we can achieve when we all work together. And in the business world, IT teams became unlikely heroes and heroines as they made Herculean efforts to maintain operations, communications and collaboration.

When we're blindsided, decisions we make need to be quick and address the immediate issues. But now we've moved past that phase, it's time to review those decisions, take stock of their impact and make sure our plans, investments and focus are sustainable and geared towards the longer term.

Over the last year, we conducted extensive research on the topics of network, collaboration and security with business and IT decision-makers in large organisations across the globe. In this report, we want to share our approach – drawing on our comprehensive experience and expertise, as well as those research findings – to help you shape your future of work and be ready for the opportunities ahead.

If the global pandemic has taught us anything, it's how important it is to be on the front foot digitally in these disruptive times.

Talking to our customers about the global economic rebound, it's clear that there's a mix of expectations about when this will be, but no one thinks it will be in the short-term. We know it'll happen, we're just not sure on the shape, size or speed of it.

But in the meantime, the business world needs to figure out how to solve the puzzle of the future of work.

The future of work means very different things to different companies for different reasons – e.g. culture, industry, etc. We looked at what organisations were saying in the media.

People first, technology second

Foreword by Gillian Chamberlain

I am genuinely in awe of what people in business have achieved in the recent past. In the face of huge uncertainty, employers and employees have combined great initiative with technology to keep businesses thriving. They've proved the concept of working from anywhere and their spirit has driven a reimagining of the future of work. As a result, I believe that hybrid working is here to stay.

Our challenge now is to make sure that a hybrid approach can match, if not exceed, the business capabilities of a traditional office-based culture. And people will be critical to this – you'll need to win hearts and minds to guarantee success. It'll be essential to consider every decision from your people's perspective and to make sure they have the right tools and support they need.

There's no one-size-fits-all blueprint for hybrid success. Instead, it's up to every organisation to find its own balance between the three key pillars of collaboration, infrastructure and security.

Great collaboration tools let people reach out to people, building the connections and relationships that underpin effective working. They take what feels natural, and even borrow from the personal sphere, and run with it, freeing up employees to work as if they were sitting next to their contact.

Collaboration technology needs to be easy to use, simple and quick – and it must be integrated seamlessly into the hybrid world.

Network infrastructure has to meet any requirement that comes along and be ready to be the launch pad for future innovations we've yet to imagine. Flexibility is vital – to adapt rapidly to new demands and to optimise a user's experience, no matter where they're working.

Plus, we must make any hybrid future secure. Organisations made quick fire decisions to keep operating that opened them up to potential new risks. Now it's time to take stock of the new security landscape and create the right blend of technology and human behaviour to protect our new ways of working.

Dr Nicola Millard's insights in this whitepaper are a fantastic starting point for building your hybrid future. Take a look, and then get in touch to turn insight into action.

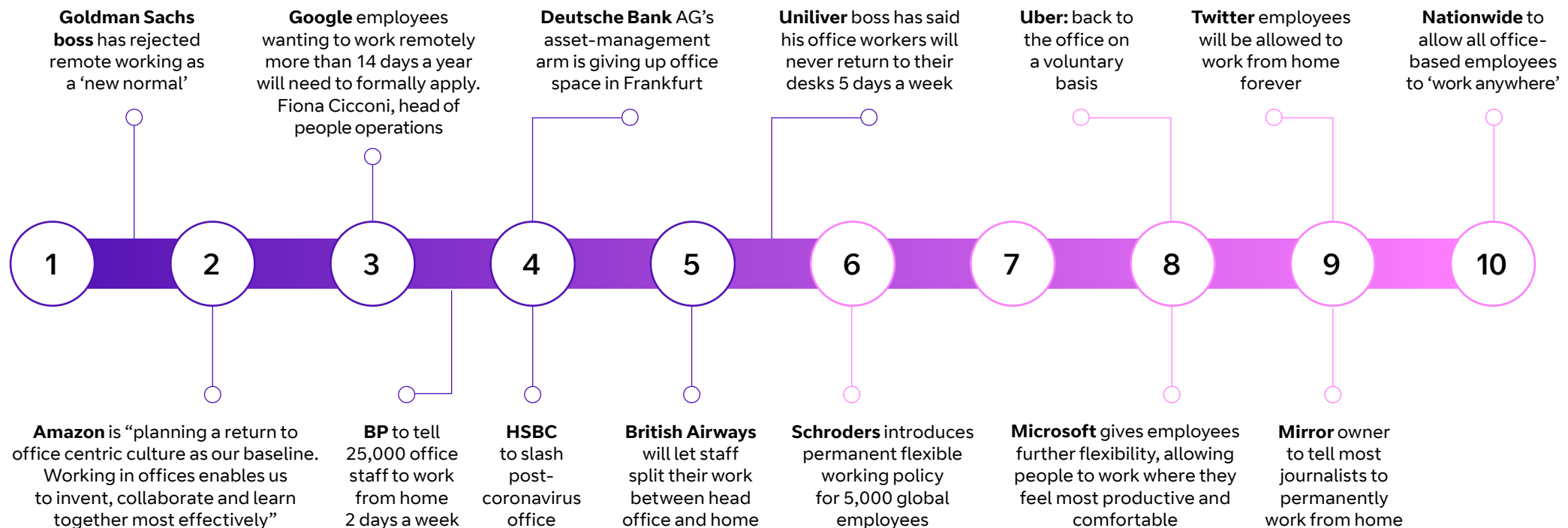


Gillian Chamberlain
Sales Director, BT Ireland

It's a new kind of workplace

100%
back to the office

100%
remote working



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Moment to reflect
Where are you on this scale?

No one size will fit all

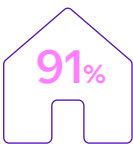
As parts of the world begin reopening in this period of instability, it's clear that different businesses will approach this in different ways. Like an ever-shifting puzzle, there won't be a single right answer.

At one extreme are organisations that will return to work in the office as they did before the pandemic. At the other, there are companies that see this as an opportunity for a total reset – where working anywhere becomes the norm and more offices are converted into event or collaboration spaces rather than desk spaces.

In truth, most organisations will sit somewhere between the two extremes – for example:



Almost half of global CEOs do not expect a return to 'normal' until next year, according to research by KPMG.



Remote working is the preferred option for executives.

Our recent collaboration research is clear, with 91% confirming they prefer to utilise a variety of work settings including offices, different work sites, their home or local co-working spaces.



58% of executives **reported an improved employee wellbeing from homeworking**, 66% for millennial executives.

The future may be uncertain, but the goals are clear

We've seen an accelerated implementation of remote work, digital transformation and automation, but it all starts with people. It should always be people first, technology second.

While technology is vital, people are what makes or breaks its success. In fact, the more technology is available the more we have to focus on people, not just as individuals, but also personas and communities. Employees are the key to making sure hybrid working is effective – so it's important to consider things from their perspective and make sure they have the right tools and support they need.

Networks have already been impacted by the leap to homeworking and the increased use of video, but whatever policy an organisation has – from 100% office-based to total flexibility – networks will need to change again. There'll be a drive for flexible networks that are designed to adapt and keep experience optimised – meaning continuous experience monitoring across the whole end-to-end call flow.

Knowing what to do is always easier than understanding how to do it. Our approach addresses the three core pillars for solving the hybrid working puzzle:



Pillar 1

Cracking the collaboration conundrum

It's been challenging trying to communicate and collaborate in a predominantly virtual world over the past year.

No matter what role you have in an organisation, we've all marvelled or lost our rag at technology – multiple times – sometimes in the same day!

The need to maintain operations has meant a boom in multiple collaboration tools – both personally and professionally – and people are expecting as good an experience in the new world of work as they've had at home.

In our recent research, we discovered that **85% of executives want a better way of integrating their collaboration tools.**

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Moment to reflect

What's most important to you when using collaboration tools?

3

Moment to reflect

Which collaboration tools have you used in the last 12 months?

4

Moment to reflect

How can you create the right learning culture?

The pandemic pushed companies and consumers to rapidly adopt new behaviours that are already well embedded and likely to stick, significantly changing the world of work.

We believe the starting point is enabling your people to be productive, collaborative and motivated. Then it's about the experience for your customers, as well as your colleagues. Any new collaboration technology or tool needs to be easy to use, simple and quick. The choice of platform itself isn't important as they're all brilliant. Effective integration is key.

Our recent research found that, on average, **business executives are using three to four collaboration and video tools and apps** and as many as **30% of them use six!**

Improving the ease of transition between these technologies, their use and better integration via multi-collaborations will enhance experience and increase productivity.

With **90% of business executives now using collaboration tools regularly**, the level of ability and skill has risen considerably over the last two years.

But back in 2017, nearly half of executives didn't know how to use them properly.

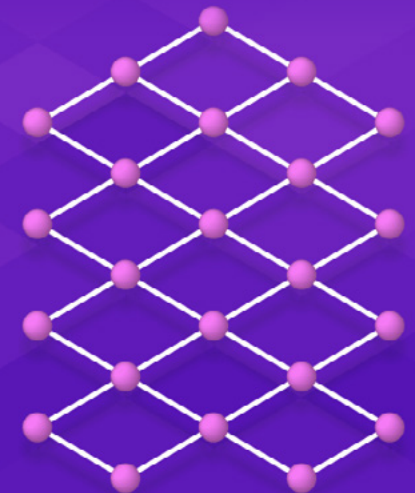
Today, it's important to make sure business executives can make the most out of their collaboration investments and take advantage of the new AI-powered features being released.

Our research highlighted that

78% of IT decision-makers

prioritise ease of use when selecting a cloud collaboration tool, while **58% of business executives** want to get support easily when it's needed.

By assisting executives in the adoption of collaboration technology and offering ongoing support and technology updates, organisations are creating the best chance of success for their technology investments.



Pillar 1

Cracking the collaboration conundrum

Work will never be the same again

Even if we don't yet know all the ways in which it'll be different, what we can say with certainty is that the sudden shift to distributed work has provided the opportunity to reimagine everything about the future of work.

No matter how many tools an organisation mandates, an individual employee will probably use a lot more. The choice of platforms will be driven as much by the role or community as the business, such as developers using Slack, agile teams using MURAL, or regulated teams using Webex.

We believe that some degree of proliferation is inevitable, and market pressures mean there will always be good new options. The platform doesn't matter – they're all brilliant. How well employees use your preferred collaboration tool or tools is what we believe matters. That's why we enable a choice of platforms (Zoom, Cisco and Microsoft) to work together (with our Session Layer solution), with the right network, and why we put such an emphasis on security and experience, whatever the platform.

Our unique ability to connect these platforms and integrate them with voice services, such as direct routing or our Microsoft Teams Operator Connect solution, make these simple to use and provide a great experience across voice and UC platforms.

A certain degree of proliferation is inevitable, and market pressures mean there'll always be good new options. We give you the commercial flexibility to go with the platform or platforms you choose and security check, test and verify all of our solutions so you have peace of mind.

Many of the room systems in place today can't support hybrid working, so they'll need to be refreshed. Given the scale of what would need to be done, we believe that lower cost, software-focused room systems will dominate.



Pillar 1

Cracking the collaboration conundrum

In the new world of work, there'll be more collaboration and meeting spaces that'll need to be set up to deliver a great hybrid working experience. This means:

Integrating your voice

Consider the move to cloud-based voice solutions and by integrating with your meetings platforms, you can experience high quality cloud telephony over SIP across one application

Optimising for video

Considering things such as acoustics, branding, backgrounds, camera angles and lighting, as well as devices like noise-cancelling speaker phones / headsets and better video cameras

Factoring in wi-fi / WLAN capacity and design

Which are critical, as is in-building 5G coverage so that colleagues can get a great experience in a crowded building or move about with consistent coverage

Adopting intelligent analytics

Which will be key to maintaining experiences. Knowing where your people are, what they're using a space for and who they're working with will help make the best and safest use of your office environment.

Putting people first and technology second doesn't have to mean significant new investment or ripping and replacing your existing solutions. Having the right choice of infrastructure, collaboration tools, processes and adoption procedures in place can be the difference between a business surviving and a business thriving in uncertain times.



Pillar 2

Tackling infrastructure transformation

The pandemic put unprecedented pressure on networks – especially corporate ones. Even before coronavirus struck, organisations were struggling to meet the ever-increasing digital transformation demands on the LAN – connecting people and devices.

We've needed more bandwidth as we spend more time collaborating through more collaboration tools and our increasing use of video. The demand for video meetings has already increased threefold, but with video likely to be in just as much demand once workers return to the office, businesses need to be prepared and ready to handle that successfully.

In our recent LAN research, we found that the **main challenge** for the 400+ decision-makers in large enterprises was delivering **scalability (21%)** and **flexibility (18%)** at the **right cost (19%)**.

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Moment to reflect
What's the main problem you face with your LAN?

The answer isn't always a new LAN

To begin with, you should focus on the applications in use and which should continue to be. Have some of your people decided to adopt Zoom when you have an organisational strategy focused on Microsoft Teams?

The move to cloud-based applications may have transformed the traffic patterns on your infrastructure or it may just be that your bandwidth is being wasted on the latest viral game or YouTube video.

We can give you the visibility you need across your entire infrastructure – not just the LAN – so you can implement policies that make the most of your existing infrastructure and give you insight into what changes are needed.

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Moment to reflect
What are the top 3 things driving the upgrade on your LAN?

In our recent LAN research, we found that the **biggest pressure facing LANs** is the need to **support hybrid working (59%)**, closely followed by the **increased use of video calling (49%)** and the **need to track users (42%)**.

As your LAN is put to the test with applications and working patterns, it's important to plan and assess these demands in detail across all possible locations. A new working approach – built with safety in mind – will mean that the plans for your office LAN just over a year ago will need to be revisited.

People will be working in different locations; office floors will have different uses and demands will change for each location. Through our experience and expertise – in the office and the virtual world – we can help you build new plans, based on proven blueprints for organisations like yours.

We've worked on implementations such as cameras to support heat sensors, PPE checks or people densities. We also work with our ecosystem of partners to deliver successful IoT projects, driving up productivity and lowering energy use.



Pillar 2

Tackling infrastructure transformation



Optimising the hybrid working experience

During lockdown, many of us learned that internet services vary massively in terms of performance, security and cost.

The new world of hybrid working means organisations need to evolve from the emergency measures taken to cope during 2020. Consistent and secure connectivity, regardless of location, need to be front and centre in terms of priority.

Our research shows that **68%** of organisations are looking **to improve homeworker LAN equipment** and **58%** are looking **to improve their office LAN** so it delivers a better experience for those working with homeworkers.

The focus on investments which optimise the experience is crucial. A good first step is grouping the personas within your organisation and their individual experience needs. Then you can establish which groups need priority investment and where you can potentially implement lower cost solutions.

Where performance and experience are important, then SD-WAN is the ideal solution, offering the opportunity to prioritise applications over and above other users in the home. It also comes with its own dedicated connection and 4G / 5G backup and is significantly cheaper than the cost of a typical office space. But where you have a user for whom experience isn't critical, we have low-cost, software-based solutions which can accelerate the performance of key applications.

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Moment to reflect

Will you be improving your employee home network services for long-term hybrid working?

To successfully adapt to the new hybrid world of working, it's clear that most global organisations need to transform their LAN. We're ideally placed with our expertise, scale, portfolio and partner ecosystem to help you solve this puzzle in the best way for your business.

Pillar 3

Securing the future of work

Even before the pandemic, navigating the ever-morphing threat landscape was challenging, but the speed and scale of the move to homeworking has sometimes made it feel nigh on impossible.

Quick fire decisions made to maintain operations has exposed corporate networks, data and employees to a raft of potential new risks.

But the focus shouldn't just be on technology to resolve this. If you just do that, then you miss the most critical element: human behaviour.

In our recent security survey, we found that **only 32% of employees say they're fully aware of the policies and procedures they should take to protect the security of their organisation's data.**

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Moment to reflect

How well-equipped are your people to defend your organisation against security threats?

The easiest way to infiltrate any organisation is through someone who works there. People get distracted, make mistakes. It's human nature. Technology can certainly help, but what your users do, or fail to do, can defeat even the best-conceived security policies and solutions.

Attacks don't need to be sophisticated. They just need to prey on people's trust. Phishing emails that include 'LinkedIn' in the subject line have an open rate of almost 50%.

And in the new hybrid way of working – the threat gets bigger. People will have new habits and schedules – they may now have regular calls in their commute time. Conversations could be overheard on the trip in and out of work, information shared in public places. People will also be out of the habit of keeping their laptop and other devices secure in public places – e.g. they may leave them behind and / or open on public transport.

Our research unearthed that

45%

of people have had a security incident at work (lost a laptop) and not reported it.



Pillar 3

Securing the future of work

It's time to deploy the human firewall

Your employees need to understand that they're a vital line of defence in securing your organisation. At BT, we believe the best way to approach this is by:

- providing education and coaching in how to behave safely online,
- helping employees appreciate the impact a breach would have on the organisation and brand, and
- creating a culture in which it's OK to speak up and admit mistakes.

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Moment to reflect

How easy is it for someone to confess to a cyber-error in your organisation?

What example are your business leaders setting?

And what's the process and payback for reporting?

You need to be clear on what your users do, and make sure you're supporting your people with the right security tech and controls, including automation. For example, our:

Managed Identity services

make sure that the people and devices accessing your network are who they say they are

Managed Cloud Access Security Broker solution

monitors your cloud usage and invokes control that restricts prohibited actions

Managed Endpoint Detection and Response solution

helps you enforce your corporate security policy, on any device, from any location

Managed Azure Sentinel solution

helps you manage threats across your Microsoft estate

We can map your security controls across your estate, identify where you have gaps and recommend where you need to focus and invest. We use our Threat Prioritisation Framework to do this. It's the first step we recommend for all our customers in their journey to solving the puzzle of securing the future of work.



Pillar 3

Securing the future of work

Misplaced confidence in security strategies?

In our research, **four in five executives say** their organisation's **IT security strategy is strong** and shareholders should be confident that the IT team has "done as much as is reasonable to be secure". And yet, **only 30%** of executives say their organisation is **excellent at using cloud computing** while protecting security, and **eight in ten** say their employer **suffered a security incident** in the last two years.

As such, the evidence suggests confidence in existing security strategies is largely misplaced.

Of course, it's unrealistic to expect zero incidents but the uncomfortable truth is that cybersecurity breaches are still occurring at an unsustainable level.

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Moment to reflect

How confident are you that you have the right security in place to support your hybrid working / cloud strategy?

After a year of upheaval, it's important to use this opportunity to reassess your security strategy and policies. The threat landscape continues to change and even if your architecture was secure a year ago, in the wake of coronavirus and widespread remote working, it may now have a raft of new vulnerabilities.

We can help you solve the future of work puzzle. Our approach is to work as part of your team identifying where you have gaps in your defence and then plug them – either by sharpening up your security hygiene or by applying automation.

All our solutions and guidance are founded on extensive intelligence and experience. Our adaptable systems allow you to respond to the morphing threat climate and the unpredictability of the future of work in real time. New ways of working means new challenges and risks when it comes to compliance and regulation.

In our research, **54% of employees** reported that they **think intellectual property and data are lost when colleagues leave** the organisation.

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Moment to reflect

How confident are you that you understand the compliance and regulation implications of hybrid working for your business?

Traditional security perimeters are shifting. Critical and personal data has become more widely distributed and is more at risk to cyber threats. You need to make sure every process, application, and area of your infrastructure revolves around the protection of privacy.

This means reviewing your security controls and processes and using a structured roadmap with a mix of detective, preventative, proactive, as well as reactive security measures.

Our security health check is a proven method of checking your security controls against industry baselines. It:

- gives you the opportunity to strengthen your security posture and cyber defence capabilities by using established frameworks and defence assessment
- identifies threats and can help you define your security strategy
- shows your cybersecurity maturity compared against industry standard frameworks (Basic CIS Critical Security Controls or the NIST framework).

And our managed security services can help you address any specific security gaps.



Offices worldwide

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