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White Paper

Office of the Future — Driving Productivity Through Business Collaboration and Office Automation Solutions



EXECUTIVE SUMMARY

All organizations, large and small, are experiencing tremendous shifts related to digital transformation (DX) and are reassessing every aspect of their workplace and work culture in order to remain competitive and maximize the possibilities offered by the newest technologies.

Considering the continued increase in work mobility and flexibility, increasing focus is also being placed on new ways of managing staff and — more importantly — staff interaction. In this context business collaboration is becoming an increasingly essential component of any DX road map as it acts as a glue to keep an ever more mobile and project-driven workforce together.

Based on the results of a survey of more than 500 Western European enterprises, this IDC White Paper examines how companies are using business collaboration and workplace automation solutions to drive productivity and business agility to meet the growing challenges of DX.

The main findings of the survey are:

- » **Investments in business collaboration are driving productivity and enhanced security.** These were indicated as respectively the first and second most important outcomes of a business collaboration culture. For 44% of European organizations business collaboration leads to an increase in productivity mainly thanks to fewer meetings, fewer emails, greater employee engagement, and faster execution.
- » **32% of companies see security as a top outcome.** Business collaboration solutions typically provide secure platforms for the sharing of critical information both internally among staff and externally with suppliers, customers, and partners.
- » **The main reason for adopting business collaboration solutions is to increase effectiveness (46%).** Integration is also a key reason, both internally among departments and externally with partners, clients, and suppliers.
- » **By increasing business agility, business collaboration solutions are contributing to a key strategic priority for businesses.** 69% of companies said the analysis of processes to increase operational agility is a strategic priority. Additionally, the improvement of team productivity and general business processes related to business collaboration contribute to critical aspects of the IT agenda. Companies place the improvement of these aspects among their top IT investment priorities, well ahead of cost reduction.

- » **Most Western European companies are generally satisfied with their business collaboration tools.** Team collaboration tools (67%) and tools enabling the sharing of files and joint working (59%) are the most required elements of business collaboration. Additionally, in order of importance, instant messaging systems, web conferencing, and virtual meeting rooms are perceived as the most critical business collaboration tools for productive and flexible working.
- » **Organizations still lack a holistic business collaboration strategy.** Although they report relatively high levels of penetration for tools such as online shared work folders (57%), PC videoconferencing (56%), and room videoconferencing (48%), the survey shows there is patchy penetration with only 3% of respondents deploying a complete set of business collaboration solutions. It is worth noting that this small proportion of companies with end-to-end solutions report much higher levels of satisfaction than the others (roughly 95% are satisfied).

Considering the strong advantages of integrating a complete business collaboration ecosystem of solutions and the security risks related to fragmented and patchy business collaboration solution adoption, IDC believes that European organizations show a need for a more holistic approach and should consider the support of specialist providers.

With business collaboration being such an important part of DX, its implementation can make the difference between success and failure. IDC anticipates that by 2022, 75% of CIOs who do not shift their organizations to empowered IT product teams to enable digital innovation, disruption, and scale will fail in their roles¹.

SURVEY BACKGROUND

Demographics

Between fall 2017 and 2018, IDC conducted an extensive survey on behalf of Ricoh, interviewing over 500 organizations in Germany, France, Spain, and the United Kingdom to understand their level of knowledge, adoption, and satisfaction with business collaboration tools.

As shown in Figures 1 and 2 the sample of companies was representative of the key vertical sectors and the most common sizes of company in the four countries. Comparing the sample by country, in Spain the two clusters of manufacturing (including construction and energy) and retail (including

¹ Source: IDC FutureScape: Worldwide CIO Agenda 2019 Predictions (IDC #US44390218, October 2018)

wholesale and transportation) had a much stronger weighting, while finance and telecoms were less represented than in other countries. The Spanish sample was also much more representative of organizations with fewer than 500 staff, which accounted for nearly 80% of the total.

Survey sample



Telephone interviews by country:
Germany (100), France (101),
Spain (201), U.K. (100)
Period: November 2017 to
September 2018

Company profile



Number of employees:
0–9 (23% of respondents),
100–499 (27%), 500–2,499 (39%),
2,500+ (12%)

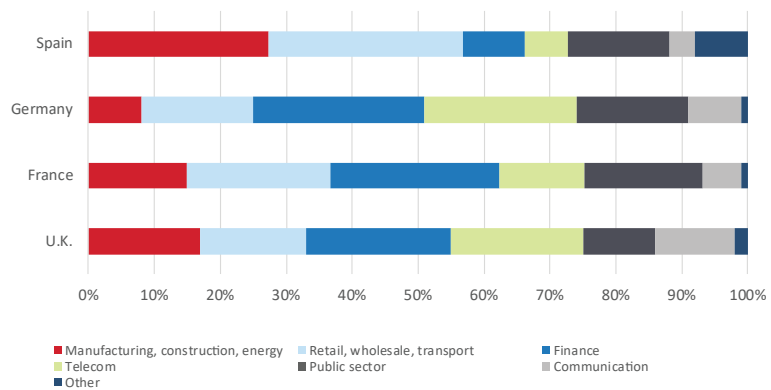
Profile of respondents



CEO/GM/owner (9% of respondents),
CIO/CTO/VP of IT/head of IT (22%),
IT director/manager (27%),
COO/Ops VP/head/director (13%),
HR director/head/manager (15%),
facility manager (6%), other (9%)

FIGURE 1

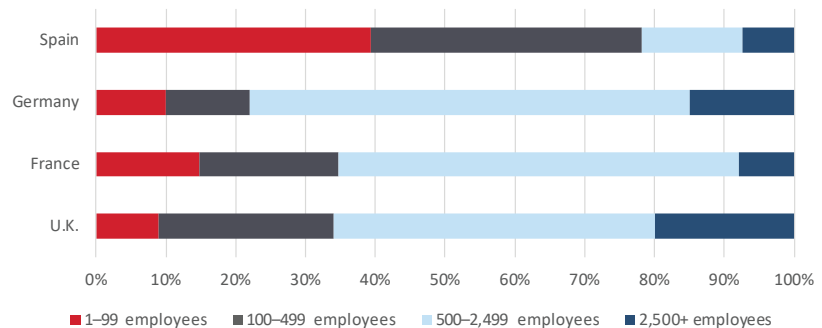
Survey Sample by Vertical



Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

FIGURE 2

Sample by Company Size

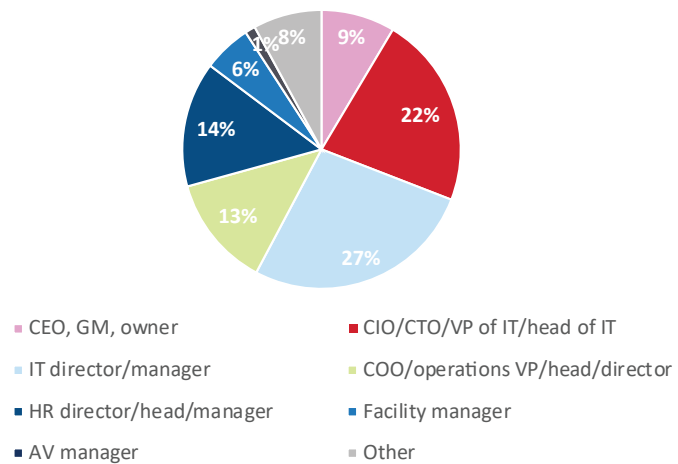


Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

Having an active role in deciding organizations' investments in business collaboration, the interviewees covered a range of roles from facility manager to CEO. IT-related staff (IT director, head of IT, CIO, etc.) represented almost 50% of the sample, reflecting the involvement that these figures generally have in decisions concerning business collaboration.

FIGURE 3

Interviewee Profile



Source: *IDC DX in the Workplace Survey*; commissioned by Ricoh; n = 502; 2018

BUSINESS COLLABORATION AS A CORNERSTONE OF DX

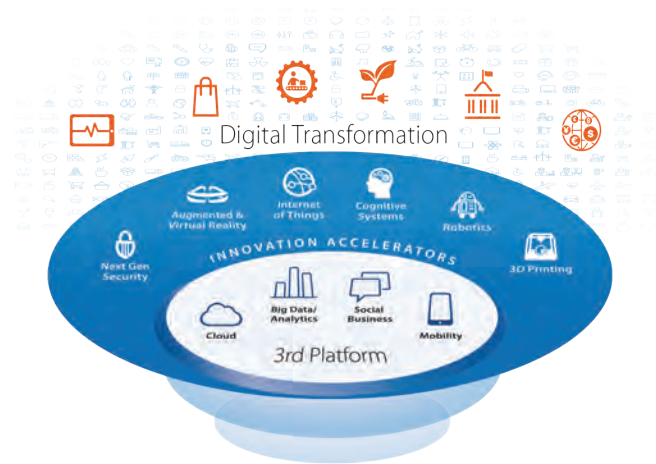
Digital Transformation Background

The vast majority of technological shifts currently taking place in organizations are part of a wider innovation process known as digital transformation which is focused on implementing disruptive technologies to create value and competitive advantage through new offerings, new business models, and new relationships.

Founded on the four pillars of mobility, social media, Big Data/analytics, and cloud, IDC's 3rd Platform model offers an intuitive outline of the most important DX technologies (see Figure 4).

FIGURE 4

IDC's 3rd Platform Model



Source: IDC, 2018

Over \$150 billion was spent on DX in Western Europe alone in 2017. DX spending is now forecast to nearly double, generating a compound annual growth rate (GAGR) of over 16% by 2021². This overwhelming penetration of new technologies is not just impacting marginal elements of businesses but is fundamentally changing the core of their operations. More than half of 2017 DX investments are estimated to have gone toward technologies that support operating model innovations³.

At the same time, as new technology accelerates processes and data streams, it challenges organizations to rethink the way they manage an increasing amount of information and how this is used to streamline decision making. And as information management evolves, the way staff go about their daily tasks is also radically shifting.

One of the most fundamental impacts of DX is an enhancement in experience delivery — not only customer experience but the experience of all stakeholders including of course staff. Influenced by state-of-the-art experiences as consumers, employees expect systems that allow immediacy of communication, they expect information to find them, and they expect to interact internally and externally in new and engaging ways that enable them to scale their talent.

Organizations have turned to collaborative applications to streamline information workflow and achieve greater agility through fast decision making.

² Source: *Western Europe Digital Transformation Forecast, 2017–2022* (IDC #EMEA42672118, November 2018)

³ Source: *Understanding Digital Transformation Spending Trends, 2017* (IDC #US42752117, July 2017)

These developments, combined with the strong increase in workforce mobility, require effective tools to communicate and collaborate, not only internally between colleagues but also externally with customers, suppliers, or partners. The survey findings reported in this paper shed light on how business collaboration solutions are crucial to enhance workplace experience while maximizing overall productivity.

Enterprise Collaboration: Connecting Ideas and Talent

IDC defines business collaboration as the interpersonal actions that create value from the shared activities around a specific goal of people that is greater than what individuals can accomplish alone. Unlike working together, collaboration is centered around processes, convergent and divergent ideas, negotiation, and a shared vision and purpose or identity.

Given this definition, business collaboration tools include videoconferencing systems (both through PCs and dedicated rooms), unified communication solutions, interactive whiteboards, corporate instant messaging, and shared online folders.

As well as meeting the need to connect an increasingly mobile workforce, these tools respond to a pivotal shift in the way business is conducted — the transition from hierarchical teams to project-driven ones. Working toward cross-departmental goals, organizations increasingly strive to eliminate silos and create project-driven teams of individuals often geographically dispersed not only within the organization but also including third parties external to the company.

Collaboration has become an imperative in the way business is conducted. Organizations have turned to collaborative applications to streamline information workflow and achieve greater agility through fast decision making. These tools are engaging employees, partners, and increasingly customers in new ways that lead to greater synergies and enhanced productivity.

The Three Dimensions of Collaboration

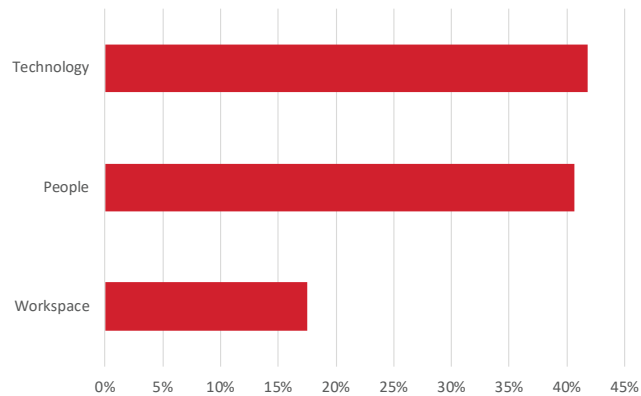
Organizations' understanding of business collaboration can vary widely. When asked to define it in an open question, over 12% of Spanish respondents could not think of an exact definition. Across countries, the majority of organizations agree that it involves interaction with both internal and external organizations such as partners and suppliers.



Technology and people are perceived to be roughly equal in terms of relevance, with a respective 42% and 41% of respondents citing them as the most important aspect of business collaboration.

FIGURE 5

Perceived Relevance of the Three Dimensions of Business Collaboration

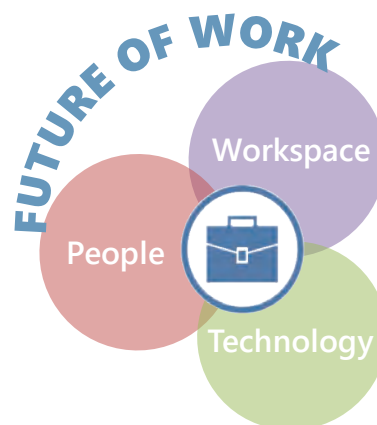


Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

Unsurprisingly, as shown in Figure 5, technology and people are perceived to be roughly equal in terms of relevance, with a respective 42% and 41% of respondents citing them as the most important aspect of business collaboration.

FIGURE 6

The Three Dimensions of Business Collaboration



Source: IDC, 2018



**IDC expects
that 65% of the
Western European
workforce will be
mobile by 2022.**

In order to function well, collaboration solutions need to act as a bridge between the three dimensions of technology, people, and workplace:

- » On the **technology** side, business collaboration solutions need to flourish in an ecosystem of endless access points and strong demand for seamless unified end-user experience and simplified management.
- » On the other hand, the **people** dimension is just as demanding as technology. Businesses are increasingly expected to deliver enhanced experiences to be able to attract and retain both customers and employees. In order to maximize their potential, employees expect seamless communication at the click of a button, immediate messaging systems, and seamless digital and physical work experiences.
- » Therefore the **workspace** needs to adapt accordingly to address these requirements.

DIGITAL WORKPLACE

Workplace Transformation

In the past few decades technology has dramatically reshaped the workplace driving a fundamental shift first from mainframe to distributed models and more recently to an ecosystem comprising endless mobile access points.

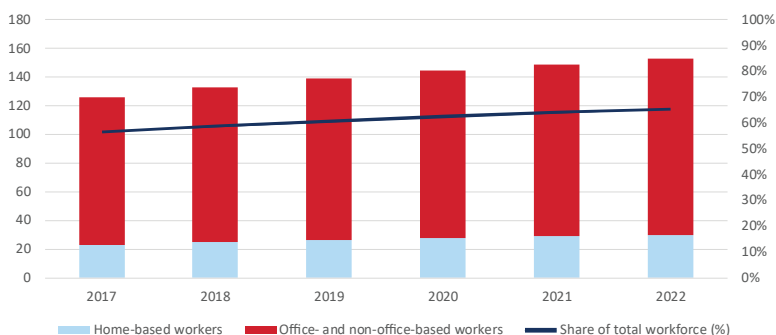
The massive adoption of mobility solutions has empowered employees to work anywhere, any time, and from any device, thereby achieving higher worktime flexibility. Across all sectors, organizations have seen tremendous growth in the total mobile workforce (including home-based, office-based, and non-office-based mobile workers).

IDC estimates that in Western Europe over 58% of the total workforce — 108 million workers — will be mobile by the end of 2018 and this percentage is set to increase to 65% by 2022⁴.

⁴Source: *Western Europe Mobile Worker Forecast and Analysis, 2018–2022* (IDC #EMEA43481318, February 2018)

FIGURE 7

Western European Mobile Workforce Population (Million)



Source: *Western Europe Mobile Worker Forecast and Analysis, 2018–2022* (IDC #EMEA43481318, February 2018)

With so many employees working outside the office the need for fixed work desks is rapidly fading, with companies encouraged to make more rational use of the workspace. Employees increasingly require systems that enable a seamless transition between physical and virtual workspaces and enable them to collaborate and communicate in real time from different geographic locations.

Companies also face a fundamental internal shift from a top-down unidirectional flow of information to a multidirectional and unstructured one which distributes problem solving and facilitates decisions.

Addressing these requirements, business collaboration solutions enable employee empowerment. They effectively translate mobility and horizontal communication (as opposed to vertical and hierarchical) into greater productivity.

Business Collaboration to Improve Productivity, Agility, and Security

To understand how critical business collaboration really is, it is important to analyze if it really addresses organizations' current priorities.

When questioned about their investment plans, Western European organizations place the **improvement of team productivity (18%)** and **of business processes (15%)** among their top 3 investment priorities.



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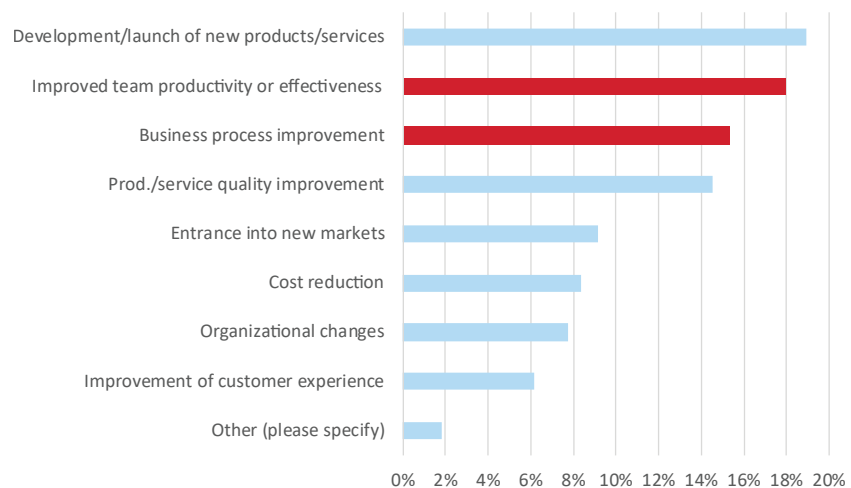
Western European companies confirm that the analysis of processes to increase agility (69%) and process digitalization (53%) are both strategic priorities.

This is especially true in larger businesses and more digitally mature countries such as the U.K., France, and Germany. Smaller companies and Spain on the other hand have more inward-looking priorities such as cost reduction.

Looking at the results by vertical it is clear that the European public sector plans to invest particularly in the improvement of business processes (29%) while the budget for the manufacturing sector is set to stretch toward the improvement of team productivity (24%).

FIGURE 8

Top Investment Priorities



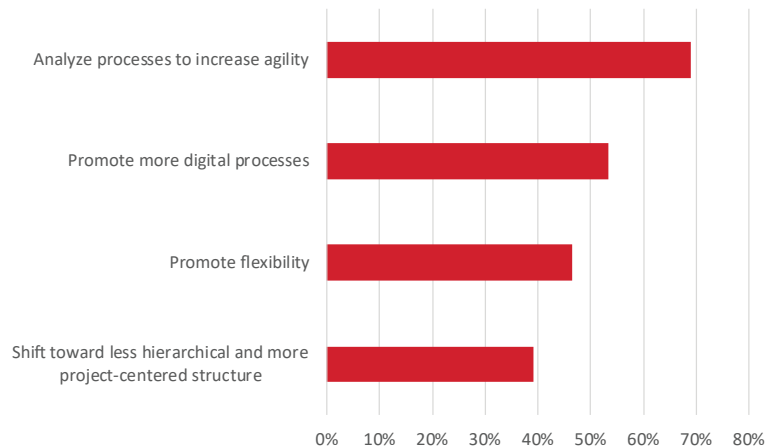
Source: *Western Europe Mobile Worker Forecast and Analysis, 2018–2022* (IDC #EMEA43481318, February 2018)

On the other hand, on the strategic side, Western European companies confirm that the **analysis of processes to increase agility** (69%) and **process digitalization** (53%) are both strategic priorities. Interestingly, operational agility in particular is a burning issue for the public sector and for telecommunication companies, with a respective 81% and 75% of respondents seeing it as a strategic priority.

As larger organizations follow more structured processes their need for work flexibility is higher than in smaller ones (60% of companies with 2,500 or more staff indicate it as a priority compared with 23% in the below-100 staff segment). As a consequence, Spain, which has a higher prevalence of smaller organizations, shows much less interest in this. Interestingly it is the figure of the CEO who above all is calling loudly for more flexibility (70%).

FIGURE 9

Top Strategic Priorities

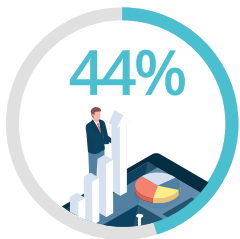


Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

it is worth noting that the perceived benefits of business collaboration solutions are strongly in line with top investment priorities. Companies agree that the most important outcome of a good business collaboration culture is by far an **increase in productivity (44%)**.

Additionally, in line with the aforementioned strategic priorities, they place **agility in decision making** among the top 3 perceived benefits (**31%**).

Survey results therefore suggest that business collaboration solutions are addressing both investment and strategic priorities.



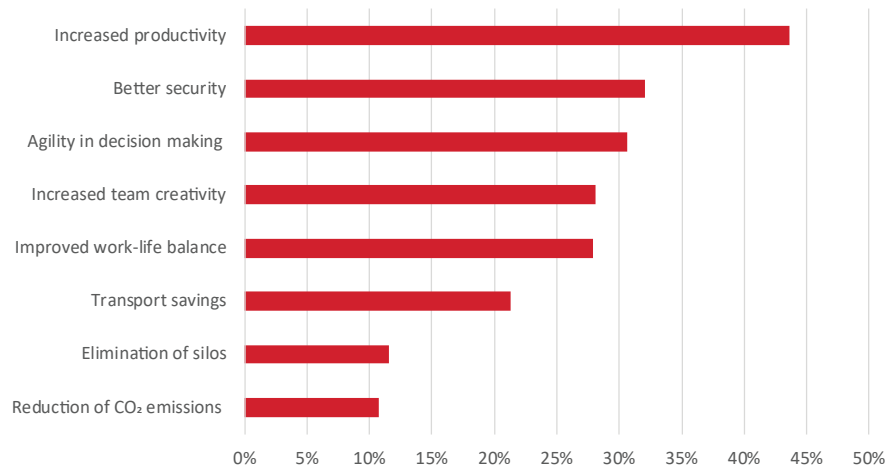
The most important outcome of a good business collaboration culture is by far an increase in productivity (44%).



As AI penetrates the workplace the link between business collaboration and team productivity will become even stronger.

FIGURE 10

Most Important Benefits of Business Collaboration



Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

To achieve the previously mentioned benefits of higher productivity and agility it is imperative that information shared in collaboration sessions is strongly protected and compliant. Respondents identified **better security** as the second most important benefit of business collaboration. As business collaboration often comes with a move to cloud and an increase in mobility, it increases the attack surface for organizations, leading to stronger actions around data loss prevention (DLP) options, GDPR, and employee privacy.

BUSINESS COLLABORATION TECHNOLOGY

Business Collaboration Tool Description

According to IDC's definition of business collaboration, solutions in this category can function in real time or in non-real-time (NRT). Real-time solutions such as videoconferencing and interactive whiteboards typically include video, audio, and/or chat, and are suitable for different types of interactions from one-to-one to large groups.

While they have been around for many years, only in the past decade have real-time business collaboration solutions come to prominence, mainly thanks to the increase in broadband and 4G connectivity, which make them much more effective and reliable also for mobile workers.

A further distinction can be made between solutions allowing interaction in the same physical space and those that enable remote collaboration. Beyond the obvious differences, it is interesting to note how both categories are set to become increasingly smarter — the first mainly driven by the Internet of Things (IoT) and robotics and the latter mainly by virtual reality (VR).

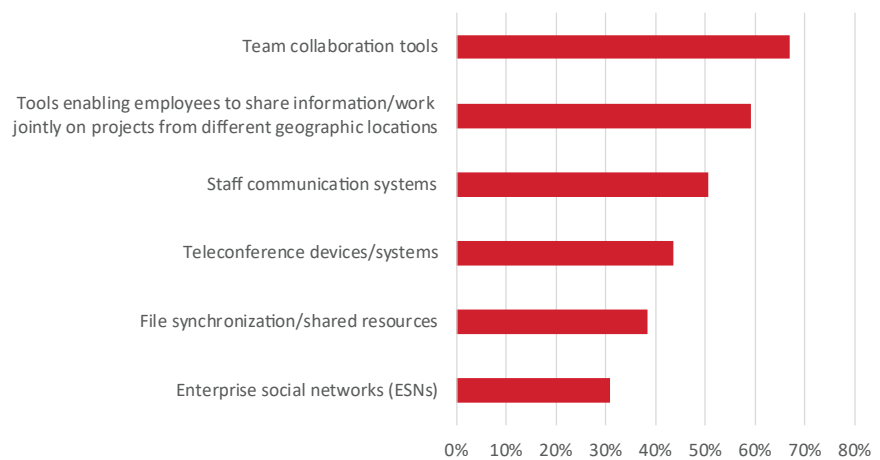
Above all, however, artificial intelligence (AI) is expected to have the greatest impact on business collaboration solutions. 70% of CIOs are expected to aggressively apply data and AI to IT operations, tools, and processes by 2021⁵. As AI penetrates the workplace, the link between business collaboration and team productivity will become even stronger.

Figure 11 shows organizations' opinions on the products and services they most require for business collaboration.

Above all, companies clearly value team work enablement, citing team collaboration tools (67%) and tools that enable them to share files and work jointly (59%) as the most required elements of business collaboration.

FIGURE 11

Products and Services Required for Business Collaboration



Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

⁵Source: IDC FutureScape: Worldwide CIO Agenda 2019 Predictions (IDC #US44390218, October 2018)



Organizations are mainly adopting business collaboration solutions to become more effective (46%).

Looking specifically at team collaboration tools, IDC expects this market to increase to a total of \$5.8 billion worldwide by 2022, representing a 19.9% CAGR in revenue for 2017–2022.

Collaboration will remain a priority for organizations to effectively connect the globally dispersed workforce, enabling them to interact with conversations, content, and data in new ways. The right implementation of business collaboration solutions leads to fewer meetings, fewer emails, greater employee engagement, and faster execution.

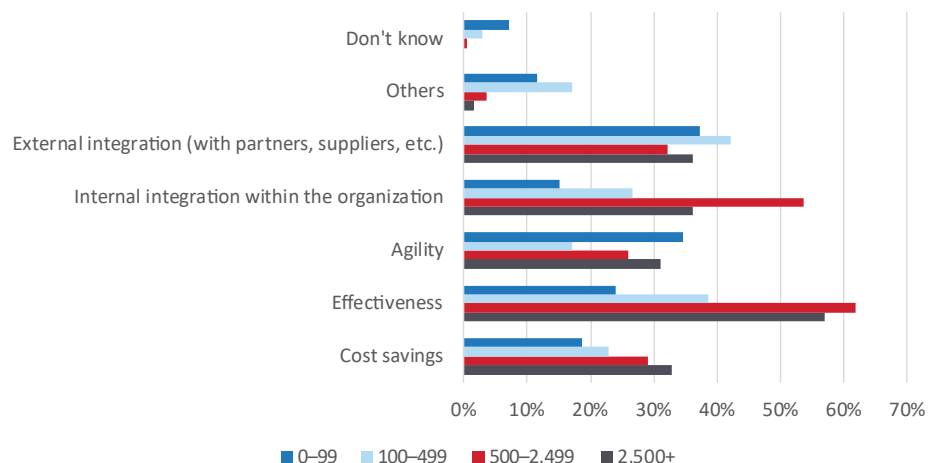
Adoption

IDC's survey shows that organizations are mainly adopting business collaboration solutions **to become more effective (46%) and to increase integration, both internally (36%) and externally with providers and clients (36%).**

However, as shown in Figure 12, this varies widely by company size. Larger companies with 500 employees or more have more dispersed operations and adopt these solutions to become more effective (almost 60%) and to integrate internally (roughly 45%). Smaller companies are much more concerned about integrating externally (almost 40%).

FIGURE 12

Reasons for Adoption by Company Size



Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018



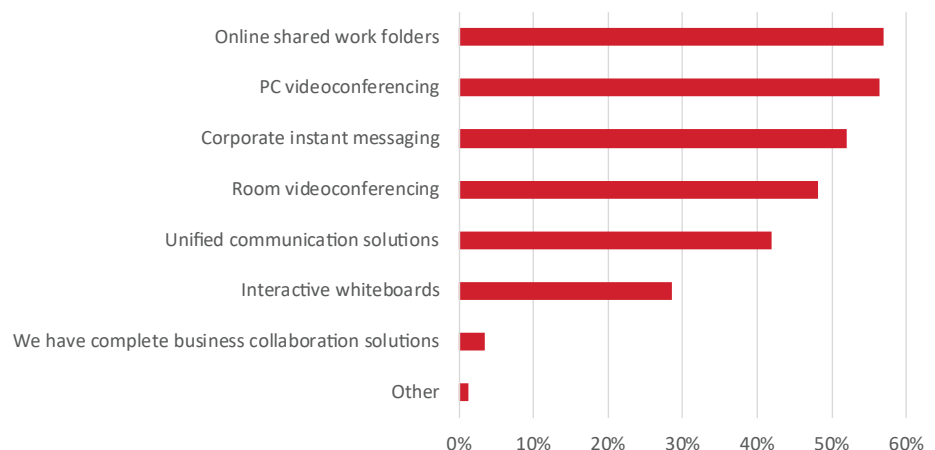
Less than 5% of respondents utilize a complete suite of business collaboration solutions.

Although uptake is still slightly lower in smaller organizations than in large ones, survey results show that business collaboration solutions have penetrated all main verticals. More than half of the interviewed organizations across France, Germany, Spain, and the U.K. say they are using, in order of importance, online shared work folders, PC videoconferencing solutions, and corporate instant messaging.

However, with **less than 5% of respondents utilize a complete suite of business collaboration solutions** of business collaboration solutions, the results suggest that companies still lack a holistic approach to cover all their collaboration needs. They will often cobble together different solutions without a centrally planned integration process. As well as creating security issues, this hinders them from fully unleashing their potential in terms of productivity and agility.

FIGURE 13

Collaboration Solutions Deployed

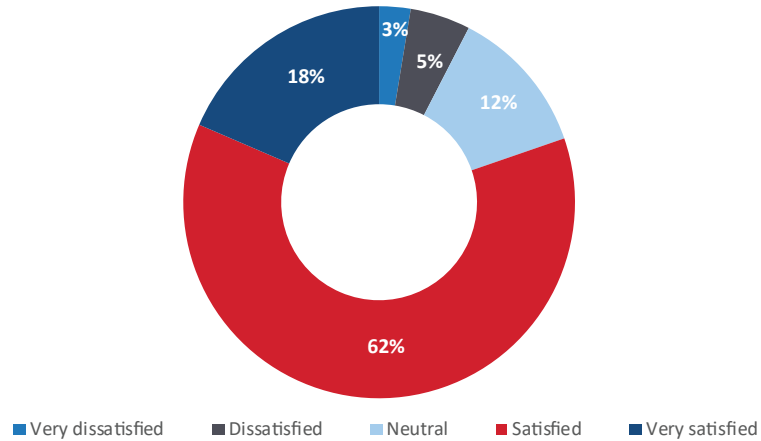


Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

Together with collaboration solutions, digital signage also plays a key role in creating enhanced user experiences and seamless communication. With digital signage already being implemented in some form by nearly all the interviewed organizations, this technology is seen by 70% of organizations as a tool to communicate internally with employees in a more engaging and intuitive way, cutting through the formality of emails (70%).

FIGURE 14

Satisfaction with Business Collaboration Solutions



Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

In IDC's survey, satisfaction with collaboration solutions was high among respondents (80% either satisfied or very satisfied), which, however, were mostly decision makers and influencers and therefore more likely to defend the solutions they selected. Considering the aforementioned downsides of a lack of holistic vision, it is also not surprising that **organizations with a complete set of solutions showed a much higher degree of satisfaction, with 95% of them either satisfied or very satisfied**. Also, most organizations (68%) think they have in place an appropriate system to promote business collaboration. This is particularly true in the communication sector (85%) while it is less evident in the public sector (58%).

They also recognize the value of outsourcing business collaboration to an external provider mainly to benefit from the experience of the provider (47%) and to facilitate technological updates or deployment of new applications (43%).

IDC's *Digital Transformation Professional Services Spending Intentions Survey* conducted in 2018⁶ confirms this last point. Customers around the globe interviewed about their experience with DX professional service providers clearly indicated that the top factor that allowed the service provider to be successful is that it delivered innovation that produced results. At the same time, the top reason inhibiting success is that it did not transform critical business processes.

⁶ Source: IDC Survey: *Worldwide Professional Services for Digital Transformation — 2018 End-User Spending Intentions Survey* (IDC #US42545218, August 2018)



Younger generations have a stronger need for state-of-the-art solutions (61%).

BUSINESS COLLABORATION CULTURE AND MANAGING PEOPLE IN ORGANIZATIONS

Business Collaboration as Part of Organizations' Culture

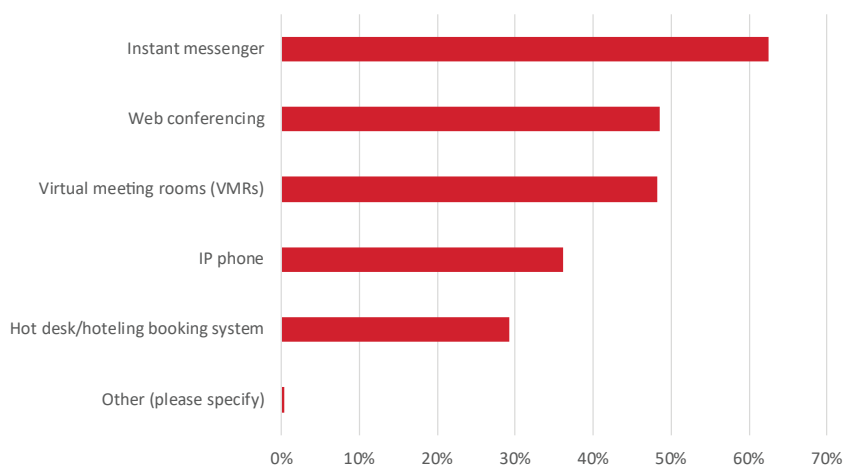
As well as being mobile, the workforce nowadays also engages with companies in an increasingly flexible way, often working with multiple organizations at the same time. The emergence of the "gig economy" is transforming human resources (HR) strategies with rules of the games often dictated by talented freelance workers.

Additionally, as the speed of technology advances, intergenerational differences become wider. Most organizations (82%) interviewed by IDC employ staff in different age groups. Among these, while all generations show strong demand for flexibility at work, younger generations have a stronger need for state-of-the-art solutions (61%), while older generations require solutions that support training (44%).

Addressing the flexibility required by both freelancers and intergenerational differences, business collaboration technology can play a central role in acquiring and managing talent. In particular, Figure 15 shows which solutions are perceived by Western European companies as most critical for productive and flexible working.

FIGURE 15

Most Critical Solutions for Productivity/Flexibility



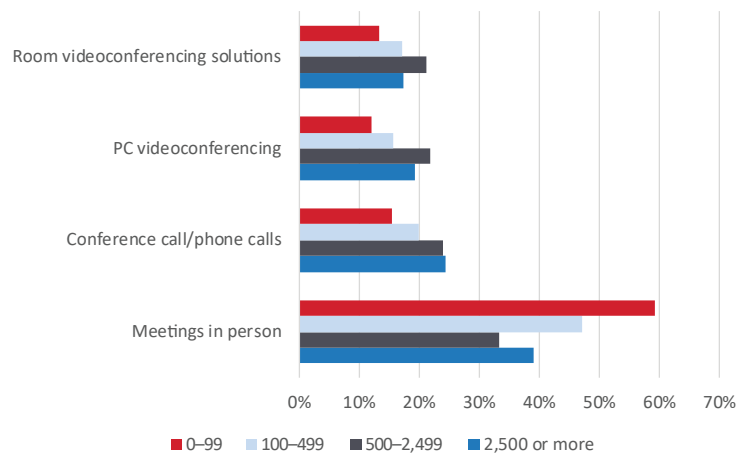
Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 301; 2018

However, for a successful business collaboration strategy, cultural and organizational challenges also need to be ironed out. A common organizational challenge is failure to acknowledge (and facilitate) IT departments' shift from cost centers to innovation centers.

Meetings are an important aspect of business collaboration and, when possible, employees still prefer to conduct them in person (44% of all respondents, rising to 60% in small companies up to 99 employees, where it is easier to organize face-to-face meetings, and 77% in Spain).

FIGURE 16

Meeting Habits by Company Size



Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

When face-to-face meetings are not possible because attendees are joining remotely from geographically distant locations, the right business collaboration tools are crucial to create an environment that mimics as closely as possible the intimacy of a physical meeting, enabling fundamental non-verbal communication to take place.

Videoconferencing is an obvious and effective alternative when meeting in person is not possible. IDC's survey confirms that companies using PC and room videoconferencing systems are more likely to indicate an increase in productivity as the most important benefit of business collaboration (49% compared with 44%).

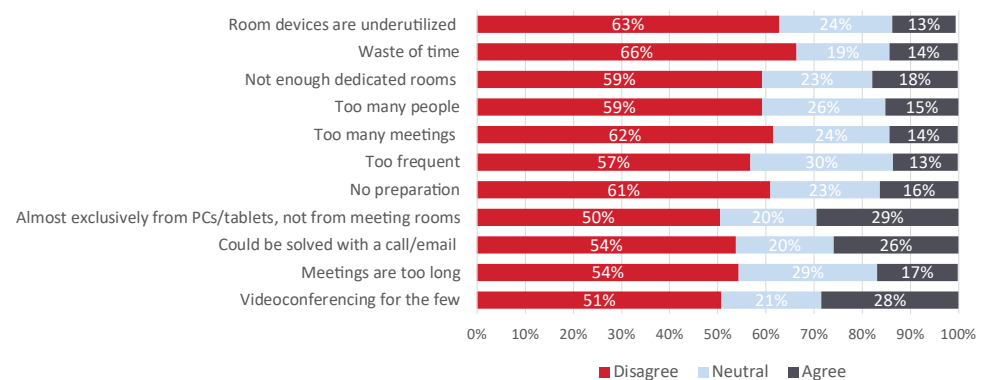
Additionally, companies that track employees' business collaboration needs and which therefore have a deep understanding of the value of each tool, see virtual meeting rooms as much more critical compared with organizations that do not track needs (over 54% see it as critical compared with 29% who do not).

However, videoconferencing is not particularly widespread with only 18% of European companies conducting meetings in rooms with dedicated videoconferencing solutions.

It is therefore not surprising that one of the main criticisms about meetings is that the use of videoconferencing is reduced to a few users within their organization, and rather than going into meeting rooms without dedicated videoconferencing solutions, employees join meetings from their PCs or tablets.

FIGURE 17

Meetings (All Countries)



Source: IDC DX in the Workplace Survey; commissioned by Ricoh; n = 502; 2018

Attitudes and preferences when it comes to meeting habits vary by country, however, with 60% of Spanish respondents complaining that meetings are too long, and U.K. respondents claiming they are too frequent. One in two French respondents believes that meetings could be replaced by a call or an email.

Overall, the survey highlights that meeting habits have much room for improvement in most countries. Despite showing strong awareness and dedication to business collaboration, Western European organizations still **fail to provide a seamless transition between physical and digital workplace experience.**

In the future, as workforce mobility and cross-departmental activity increase, having in place solutions that eliminate the boundaries between physical and digital workplaces will become crucial. As mentioned, these will also be tackled by bridging the increasing gap between younger and older generations of employees.



60% of Spanish respondents complained that meetings are too long.



In the future, as workforce mobility and cross-departmental activity increase, having in place solutions that eliminate the boundaries between physical and digital workplaces will become crucial.

In this context, advanced videoconferencing solutions with dedicated rooms are important as they maintain the sense of proximity of physical meetings, leading to higher integration, both internally and externally with customers, suppliers, and partners. While contributing to a more rational use of physical spaces, investment in appropriate videoconferencing solutions can drastically reduce the need to travel for physical meetings, helping to reduce organizations' environmental footprint.

Ricoh's Vision and Strategy

With 80 years' experience in imaging technologies as well as strong capabilities in managed services, outsourcing, IT, and communication services, Ricoh is currently diversifying into new lines of business that significantly expand its bandwidth. Its Digital Workplace Transformation services leverage dedicated AV and IT automation expert teams to deliver more flexible workplace environments that better answer to new challenges connected to DX.

Through the four clusters of Meeting Spaces, Video & Collaboration Solutions, Digital Signage, and Workplace Management Solutions, Ricoh's Workplace Collaboration Solutions portfolio relooks at real estate, assets, and systems to create the best workplace fit. In line with organizations' expectations, its **value proposition is aimed at workplace productivity, employee empowerment, and staff engagement** — all while optimizing real-estate utilization and maintaining a layer of security and compliance.

With a view to improving customers' physical and digital workplaces and replacing outdated hardware and software, Ricoh's typical stages of customer engagement include:

- » **Design:** After an assessment of the existing workplace the company proposes either predefined packages or custom solutions that also leverage tools from third-party workplace suppliers.
- » **Implement:** With extensive local presence the company handles installation and integration.
- » **Manage:** Implemented solutions are fully managed as part of a subscription model.

IDC believes that with a worldwide presence across 200 countries and experience in managed services, Ricoh has the right capabilities to thrive in this market, especially targeting large and dispersed corporations that, as discussed, are most likely to foster flexibility, internal integration, and

cross-departmental team productivity. The company can also bring value to SMBs through a holistic and consolidated approach (as opposed to a fragmented one typical of SMBs) to collaboration which, as discussed in this paper, reduces security and compliance risks.

NH Hotels Case Study

As Ricoh Spain's largest ever deal in the Spanish hotel industry, the NH Hotels case study in 2017 offers an example of how Ricoh can support workplace transformation through a customized suite of solutions. Besides the installation of an extensive document imaging infrastructure of 330 devices throughout all facilities in Spain, at the center of Ricoh's engagement was the creation of an enhanced user experience for both staff and clients. The customer aimed to embrace DX while reducing operational costs and maximizing productivity.

Ricoh installed a complete meeting room management system comprising software and digital signage solutions covering 14 meeting rooms in the company's headquarters in Madrid. As well as offering an intuitive way for staff to book and utilize meeting rooms and resources, the solution enables NH Hotels to understand how these are being utilized by tracking the real number of physical and remote meeting attendees in order to identify and address inefficiencies. Leveraging videoconferencing and meeting solution technology respectively from Ricoh company Technotrends and solution partner Condeco, Ricoh is able to guide clients toward the best mix of physical and virtual meetings in the interest of general productivity and costs. Ricoh also installed interactive whiteboard technology with an embedded videoconferencing system. The display enables the sharing of information in meetings as well as the recording of notes taken on screen during discussions. Ricoh says it is currently working on extending the functionality of its whiteboards beyond their core collaboration/communication role in an effort to incorporate a cognitive assistant that will improve the overall experience. In addition to hardware installation, Ricoh will provide NH Hotels with 24 x 7 maintenance, remote monitoring, and helpdesk services.

(For more information, see *Office of the Future: Ricoh Spain Lands Workplace Transformation Deal as Part of Largest-Ever Hospitality Engagement*, IDC #EMEA44324118, October 2018.)



The exponential increase of information handled by organizations will create huge challenges linked to leveraging relevant data when it is most needed. Cognitive and AI will be crucial to overcome this.

Key Recommendations for Users

Having empowered the workforce to change the way day-to-day tasks are performed, business collaboration solutions are now on the verge of a new stage which has the potential to dramatically enhance human interactions. Cognitive and artificial intelligence are set to take collaboration solutions to the next level. Virtual assistants based on conversational AI technologies and machine learning solutions are already enhancing business collaboration and, thanks to the increasing familiarity that employees have with these technologies embedded in consumer products and services, they will continue to improve processes and streamline decision making.

Going forward, the exponential increase in information handled by organizations will create huge challenges linked to leveraging relevant data when it is most needed. Cognitive and AI will be crucial to overcome this. Through speech recognition and machine learning they will enable automated ediscovery functions in team collaboration sessions, ultimately leading to higher productivity and competitiveness. IDC therefore believes that it is imperative for organizations to make a collaboration culture part of their DX road map in order to remain competitive.

Survey results discussed in this paper confirm that **business collaboration solutions have become a must for any digital transformation road map**.

As organizations prepare for either the first implementation or the enhancement of business collaboration solutions, IDC recommends that they:

- » **Analyze current business processes and culture and map out current collaboration needs.** Different departments may communicate and collaborate in different ways.
- » **Identify siloed talent** that would benefit from business collaboration being fully unleashed.
- » **Set out business priorities and choose the right mix of collaboration tools** to help achieve them.
- » Aim to find, based on existing and future requirements, **the right balance between physical and digital workplaces with seamless transitions.**
- » **Adopt a security-first approach for all collaboration solutions** deployed in order to create a solid ecosystem in which employees, partners, suppliers, and customers collaborate.
- » **Avoid a DIY approach and consider third-party providers of comprehensive managed as-a-service (aaS) models** to more easily achieve efficiency, scalability, and security.

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