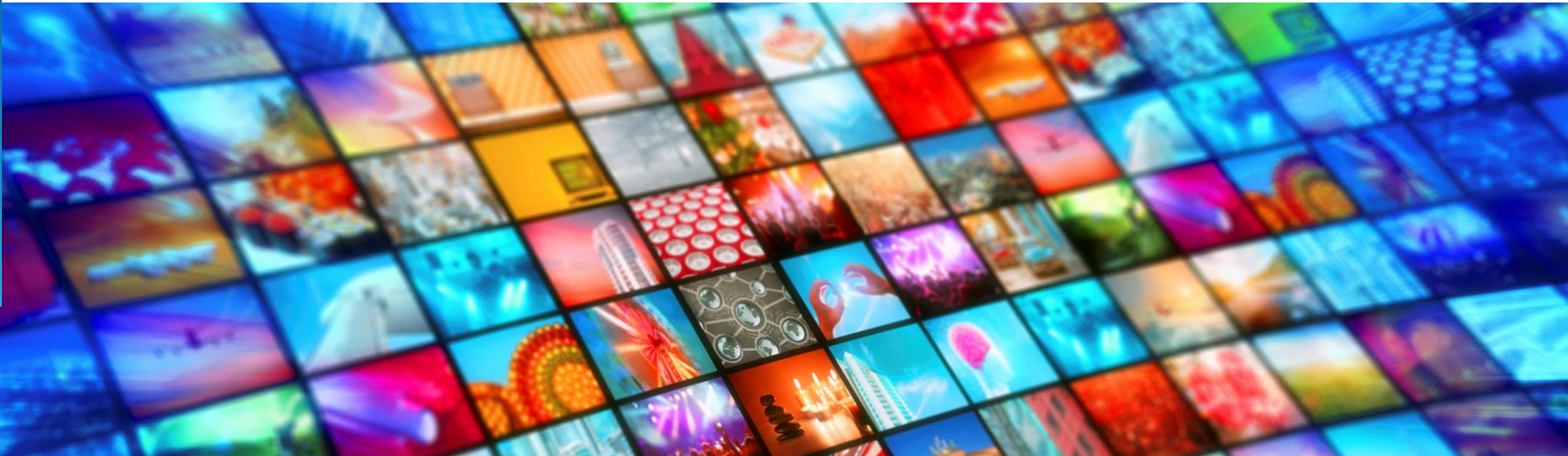


Is Work From Home (WFH) the Future of Work? A Perspective on WFH, Locations, and Delivery Strategy Beyond COVID-19

December 2020: Complimentary Abstract / Table of Contents



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▶ Market Vista™

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Background of the research

Before COVID-19, most enterprises and service providers of global services regarded WFH as a hard-to-govern delivery model, relevant only for limited services and employees, and typically for Business Continuity Planning (BCP). However, COVID-19 has fundamentally altered that perspective.

In a post-COVID-19 scenario, we expect WFH to emerge as an imperative for many organizations, as they look to make fundamental changes in their working models, delivery strategies, and shoring decisions. While most organizations and service providers have approached WFH opportunistically, they are now trying to understand the business case for scaled adoption, beyond BCP benefits including reviewing factors such as cost and talent.

This report presents the results of our 2020 Work From Home (WFH) for Outsourcing and Business Services Survey including participation from stakeholders across ~200 service providers and enterprises. The study, captures the pulse of the market on key aspects related to WFH, concerns and best practices about remote working, industry developments due to COVID-19 and implications on the future of delivery and locations strategies

This report will guide business leaders on post-COVID-19 implications on the global services industry, with WFH strategy design and implementation aspects, including:



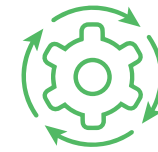
Reactions to
COVID-19



Business case for WFH and
how it fits the next normal



Key challenges and
concerns



Key action steps for
operationalizing WFH



Changes in delivery
and location strategies

Overview and abbreviated summary of key messages

This research leverages our survey and interactions with 200+ service provider executives and enterprise/GBS/shared services stakeholders across locations and industry verticals. It takes a deep dive into the key aspects related to WFH, concerns and best practices about remote working, and implications of industry developments during COVID-19 on future delivery and locations strategies, such as key changes to delivery portfolios, shoring mix, and locations decisions.

Some of the findings in this report, among others, are:

Work From Home (WFH) adoption post COVID-19

- WFH penetration is likely to decline from COVID-19 levels; however, it is likely to remain significantly above what it was pre-COVID-19, as organizations look to embed long-term, and scaled WFH adoption, with increasing preference for hybrid work models
- When developing WFH strategies, organizations are shifting focus from a cost-led approach, to an increased emphasis on value delivered

Key concerns regarding WFH

- Organizations see data security and compliance, organizational culture, and productivity as key inhibitors to permanent adoption of WFH
- Employee burnout and difficulty in team collaboration, from an employee productivity standpoint, along with assimilation of new hires and building engagement, from a talent and culture perspective, are cited as critical issues within the WFH model

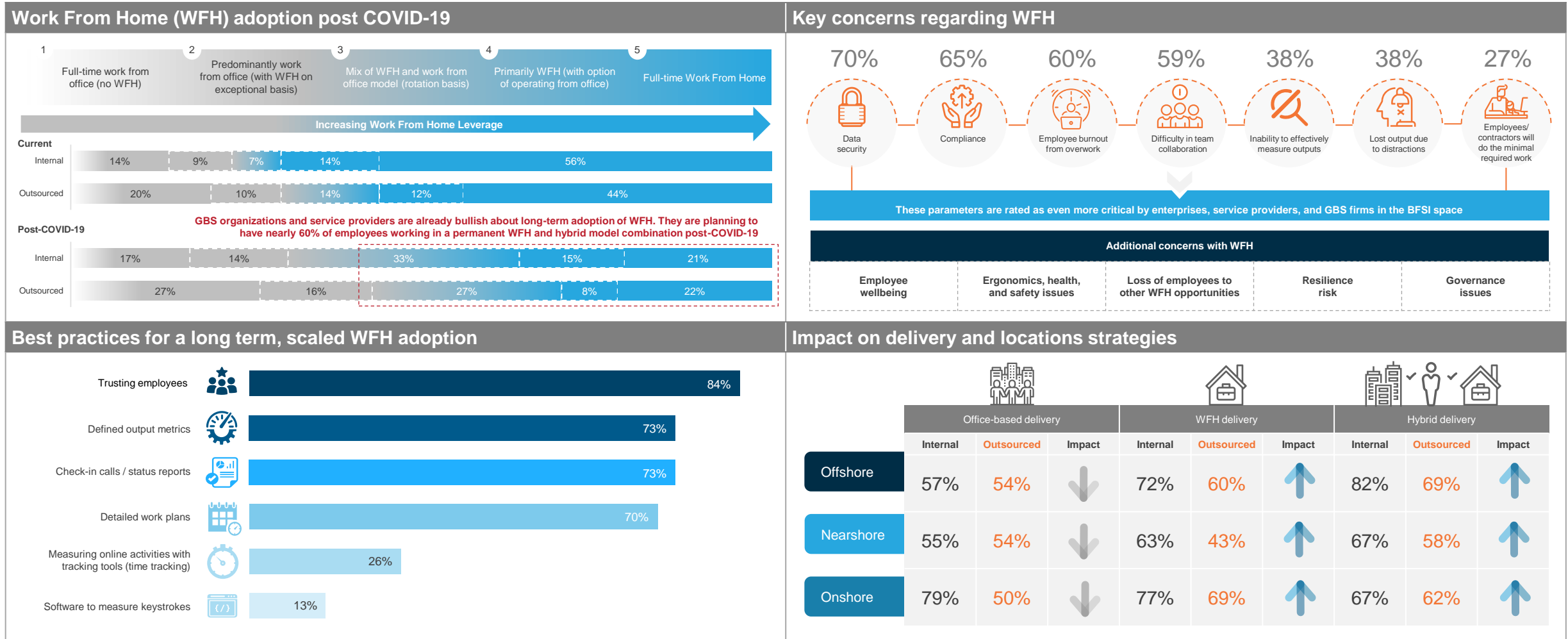
Best practices for a long term, scaled WFH adoption

- In order to alleviate these concerns, organizations are investing in best practices such as encryption protocols and network risk monitoring for security and compliance, as well as leveraging fully-virtual talent acquisition and management tools for employee engagement and training
- Non-technology levers, such as building a foundation of trust, defining output metrics, and establishing regular check-ins, are considered crucial for managing employee productivity

Impact on delivery and locations strategies

- Onshore and nearshore office-based delivery is expected to reduce significantly, while there is an increased preference for a hybrid (mix of WFH and work from office model on a rotation basis) service model and focus on consolidation and establishing co-working spaces
- Organizations are anticipating several changes in third-party contractual agreements, around data privacy and liability, governance models, etc.

This study offers four distinct chapters providing a deep dive into key aspects of the future of WFH, and location and delivery strategies post COVID-19 for business services; below are four charts to illustrate the depth of the report



Research calendar

Market Vista™

■ Published
 ■ Planned
 ■ Current release

Flagship Market Vista™ reports

	Release date
Market Vista™: Q2 2020	April 2020
Market Vista™: 2019 Year in Review and Outlook for 2020	August 2020
Market Vista™: Q2 2020	April 2020
Market Vista™: Q3 2020	August 2020
Market Vista™: Q4 2020	November 2020
Market Vista™: Q1 2021	Q1 2021
Market Vista™: 2020 Year in Review and Outlook for 2021	Q1 2021

Thematic Market Vista™ reports

	Release date
Global Services Market Pressing Issues: Service Providers' Perspective	March 2020
The Impact of COVID-19 on Global Delivery Locations and Portfolio Strategies	May 2020
Workforce Productivity: The Next Frontier in Improving Organizational Efficiency	June 2020
Risk Radar Newsflash US H1B Visa Ban to Further Drive Offshoring	July 2020
Industry Insights - Oil and Gas	October 2020
Is Work From Home (WFH) the Future of Work? A Perspective on WFH, Locations, and Delivery Strategy Beyond COVID-19	December 2020

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