BTA's Cruise to Success

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The Great Mobile Workforce Debate

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Ricoh Americas Corporation

Welcome

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The Changing Workplace

Today's Complex Business Environment

- Globalization
- Economic challenges
- Mobile technologies
- Information overload
- Workforce behavioral shifts
- Social / collaboration

Changing Information Environment

The "Intersection" of Technology, People, and Process…

Technology Impact

The arrival of tablet technology allowing users to interact with digital documents as paper and cloud-based applications supporting individual workflow needs

Work Style Shift

Three unique generations in workforce that consume information differently

Organizational Behavior Shift

Actions to downsize real-estate and minimize IT spend create greater challenges to address the results of the "Perfect Storm"
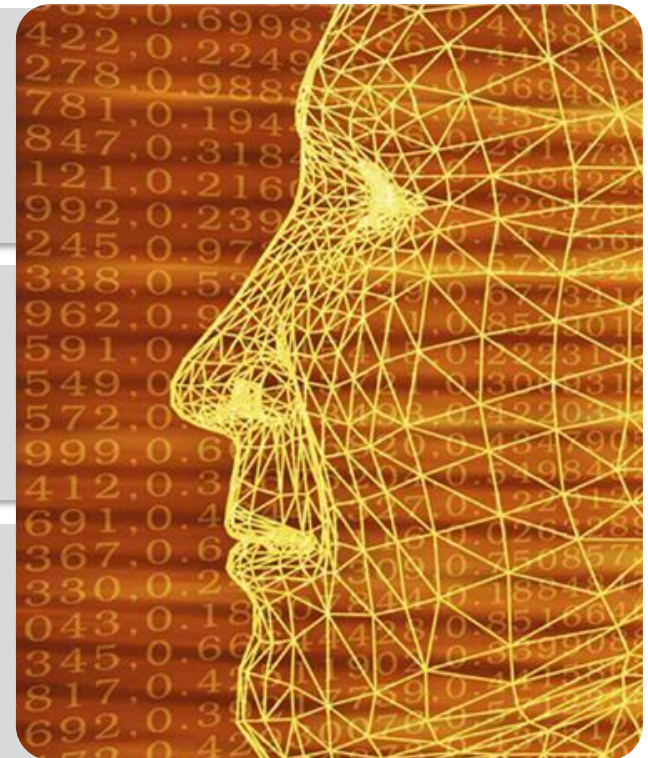
Unprecedented Adoption

25 billionth app was downloaded in 2012

2016
282.7MM

2013
172.4MM

2012
122.3MM

Embracing Change

Generational Behavior Changes

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Gen "Y"

- Born early 1980's

- ***Prefer the use of digital information and technology***

- Will represent more than 50% of the workforce in less than three years.

- Very team oriented with less focus on personal recognition

- Defining the use of text, chat and social media as primary communication medium

- Transacts all personal business on line and sees immediate accessibility and ability to self-serve as highest level of service

- First generation to have internet since kindergarten

Gen "Y" (a.k.a. Millenials, Echo Boomers, Peter Pan Generation, Digital Natives, etc.)

Will represent more than *50%* of the workforce in less than three years.

Important because:

- They prefer the use of digital information and technology

- They are excellent at research with less focus on static knowledge so access to a store of experiential knowledge is critical to be effective

- Facebook has conditioned them to change without stress

- Will not have the same "Hands On" Mentoring relationships experienced by prior generations

- Expects immediate access to and use of information

- Less employer loyalty

- The workplace will shift to accommodate these workers

Generational Behavior Changes

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Baby Boomers

- Born post WWII – early 1960's

- *Believes personal face-to-face interaction as highest level of service*

- Will likely exit the workplace by 2021; significant experiential knowledge will leave with them

- Typically a contrarian point of view on the long-term viability of technology which they interpret to suggest human knowledge and skills become less valuable than a "computer"

- Will oppose change with a vengeance if they are asked to work differently

- Transacts limited personal business on line

Baby Boomers

Will exit the workplace by 2021

Important because:

- Significant experiential knowledge will leave with them

- Tend to keep information to themselves to increase personal value

- Typically a contrarian point of view on the long-term viability of technology which they interpret to suggest human knowledge and skills become less valuable than a "computer"

- Do not travel heavily as a rule so the concepts of "Mobile and Remote Workers" does not resonate or feel personal

- Will oppose change with a vengeance if they are asked to work differently

Generational Behavior Changes

Gen "X"

- Born between mid-1960's to early 1980's
- *Relies heavily on phone for customer service needs. Less reliant on face-to-face support*
- Transitioning into (or currently in) position of decision making
- Understands change and is not opposed to it
- Requires significant proof before accepting new ideas or concepts
- "Latch-key " generation with degrading family structure creates less confidence in formal infrastructure
- First generation to have PCs

Gen "X"

Is the group that is transitioning into, or currently sits in, the position of decision making for corporate direction

Important because:

- The generation has placed the corporation/company as top priority and is the "Workaholic" age
- Technology has shifted dramatically during the tenure of this worker so they understand change and is not opposed to it
- Willing to shift but not sure how
- Requires significant proof before accepting new ideas or concepts
- Important to find the right customer due to the spread between "Contrarians" and "Zealots"

Mobile/Remote Workers

Very different needs, benefits and challenges

- Companies have had mobile workers for decades – today's tools enabling productivity are unprecedented

- Access to information is critical for both – how organizations provides it differs

Will the Traditional Office Exist in 50 Years?

We asked 2,500 Americans, and they said…

DESPITE APPEAL OF WORKING REMOTELY, Most Americans would like to work virtually but think the office will endure, according to online poll conducted by **Harris Interactive** for Ricoh **THE TRADITIONAL OFFICE IS HERE TO STAY**

64% of Americans said they would prefer to work virtually

However, **53%** said they believed the concept of the traditional office will last at least another half century (50 years)
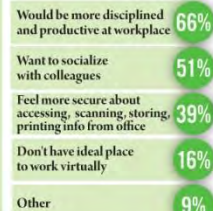
THE AGE PARADOX

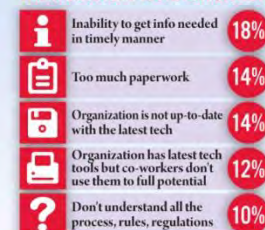Surprisingly, younger people seem to be the least enthusiastic about working virtually

PREFER WORKING IN AN OFFICE

years old	
18-34	43%
35-54	31%
55+	36%

WHY WOULD YOU CHOOSE TO WORK FROM THE OFFICE INSTEAD OF WORKING VIRTUALLY?

- Would be more disciplined and productive at workplace — **66%**
- Want to socialize with colleagues — **51%**
- Feel more secure about accessing, scanning, storing, printing info from office — **39%**
- Don't have ideal place to work virtually — **16%**
- Other — **9%**

67%

OF EMPLOYED ADULTS FEEL DISSATISFIED ABOUT SOMETHING WITH THEIR CURRENT WORK SITUATION

- Inability to get info needed in timely manner — **18%**
- Too much paperwork — **14%**
- Organization is not up-to-date with the latest tech — **14%**
- Organization has latest tech tools but co-workers don't use them to full potential — **12%**
- Don't understand all the process, rules, regulations — **10%**

"Virtual office technology has not yet caught up to employees' fears that they may become irrelevant if they're not perceived as being fully engaged with the traditional office… But innovation is moving at unprecedented speeds in this area, and progress will come."

Terrie Campbell,
Vice President, Strategic Marketing
Ricoh Americas Corporation

harris INTERACTIVE

This survey was conducted online within the United States by **Harris Interactive** on behalf of **Ricoh** from October 3-5, 2012, among 2,512 adults ages 18 and older.
This online survey is not based on a probability sample, and therefore no estimate of theoretical sampling error can be calculated.

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Organization Behavior Changes

- Adapting to the "Democratic Consumerism" effect (BYOD)

- Key Initiatives to leverage Real Estate

- Square feet per worker are projected to decline by 32% from 2010 to 2017

- Pushes workers to virtual workspace

- Focus will be on remote/mobile workers

- Secure data availability on demand

- Collaboration and Use of technology for virtual workspaces / "Hot Spots" / Hotelling

- IT and Business Leaders are moving closer together to ensure best use of assets and alignment of business requirements with IT spend

- Need more from Data Analytics, however, most organizations struggle with efficient access to data

These changes started because of the economy but technology and user-behavior is <u>driving</u> the change.

This does not reverse as economy improves….

Organizational Effectiveness

Best Practices

- Mobile devices

  – Currently workers receive pushed content

  – What will this look like in the future?

- Maturity of an organization

  – Organization acting like an organism

  – Two-way communication between brain and nerve endings

What does this mean for me?

Navigating today's Complex Business Environment

- Tablets are here to stay

    o How does this impact your organization?

- The Generational Divide

    o Understand and leverage each generation's strengths

- Mobile workers

    o Does your organization have the tools for them to be productive?

- How has your organization changed?

    o Creating more effective use of and access to information

    o What is your strategy to mature your organizational effectiveness?

QUESTIONS?

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