BLUESCAPE®

2020 State of Working from Home Report

Introduction

In 2020, organizations around the world had to implement a remote work strategy suddenly. Some of these companies were staunch opponents of this type of work flexibility. While others were open to it, and even some had already implemented work from home options. No matter the company's position, COVID-19 forced their hand.

At Bluescape, we wanted to understand how managers and employees view remote work.

Are they aligned? Or do they have dramatically different views on the value of working from home, or as some say, working from anywhere?

To understand managers' and employees' perspectives about remote work, we used a holistic framework. The framework takes into consideration the various influences on how we experience work. The survey asked questions about people, processes, and tools.

People
These questions center on aspects of work that are people-centric: skills and wellbeing, for example.

Process
These questions focus on how the workforce views the maturity of processes that support a remote work reality: needs to work remotely, maturing remote work practices, for example.

Technology
These questions inquire into how technology and tools, like video and instant messaging, helps and hinders getting work done when working from home.
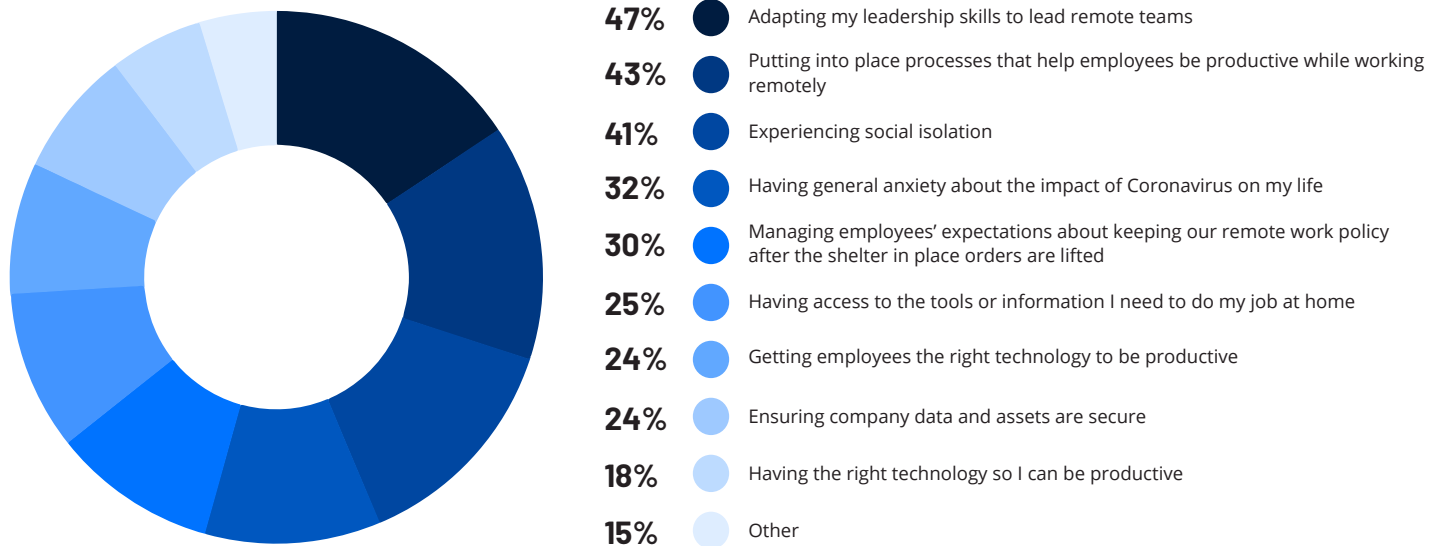
Remote Work: The Challenges and Needs

We asked two questions of both managers and employees about the challenges and needs associated with working remotely.

Management View on Challenges

47%	Adapting my leadership skills to lead remote teams
43%	Putting into place processes that help employees be productive while working remotely
41%	Experiencing social isolation
32%	Having general anxiety about the impact of Coronavirus on my life
30%	Managing employees' expectations about keeping our remote work policy after the shelter in place orders are lifted
25%	Having access to the tools or information I need to do my job at home
24%	Getting employees the right technology to be productive
24%	Ensuring company data and assets are secure
18%	Having the right technology so I can be productive
15%	Other

Managers' most significant challenge was adapting their leadership style to leading remote teams. The problems ranged from keeping employees informed and feeling connected to the company to leading teams to focus on strategic efforts and keeping employees focused and productive.

Managers ages 65-74 have different challenges than all other age groups. Their top two concerns focused on organizational security and efficiency.

- 50% say it's a challenge to ensure company data and assets are secure
- 50% say it's a challenge to put into place processes that help employees be productive while working remotely
- 43% say it's a challenge to have access to the tools or information needed to do their job at home

What's interesting about the top three challenges for this age group is no other management age group cited security as a top challenge. This is likely due to the seniority level that those ages 65-74 hold within the organization.

Employee View on Challenges

%	Challenge
57%	Experiencing social isolation
50%	Having general anxiety about the impact of Coronavirus on my life
40%	Having the right technology to be productive
37%	Other
34%	Having access to the tools or information I need to do my job at home
30%	Following processes that help me be productive while working remotely
25%	Knowing what is expected of me
22%	Working with a manager who knows how to help me stay motivated while working from home
3%	Keeping company data and documents secure

Employees biggest challenge is wellbeing. The top challenge is experiencing social isolation, followed by having general anxiety about COVID-19's impact on employees' lives. The majority of comments centered on struggles in finding a way to integrate work and personal demands. Employees are struggling to find ways to get their job done while homeschooling their kids or caring for a family member. Also, employees commented that they are working longer hours.

Both managers and employees highlighted that technology limitations also interfere with their productivity. The biggest culprit is internet bandwidth issues.
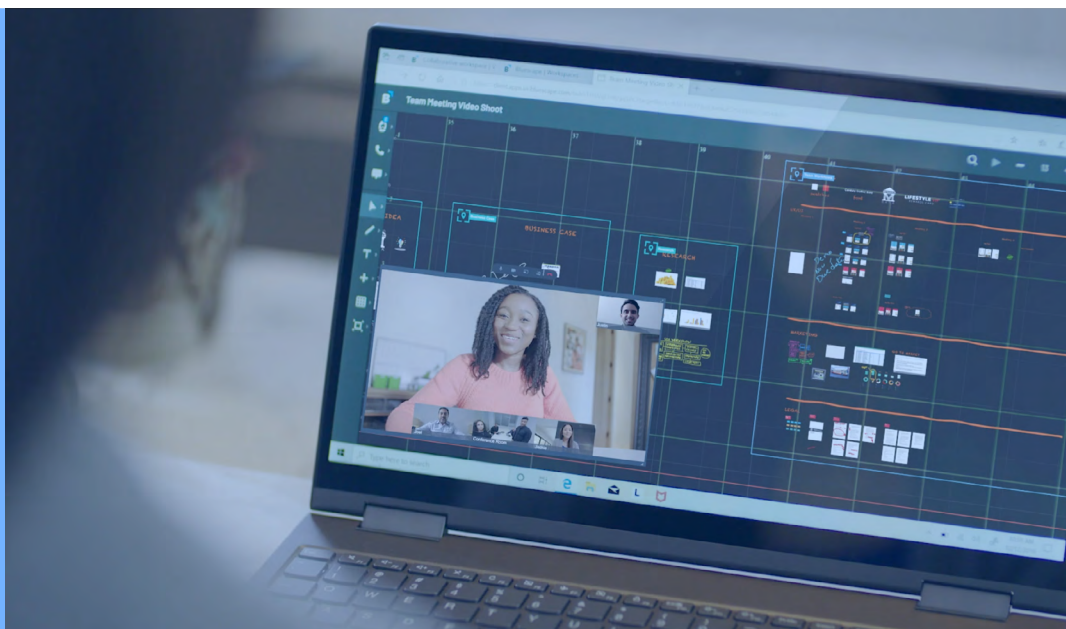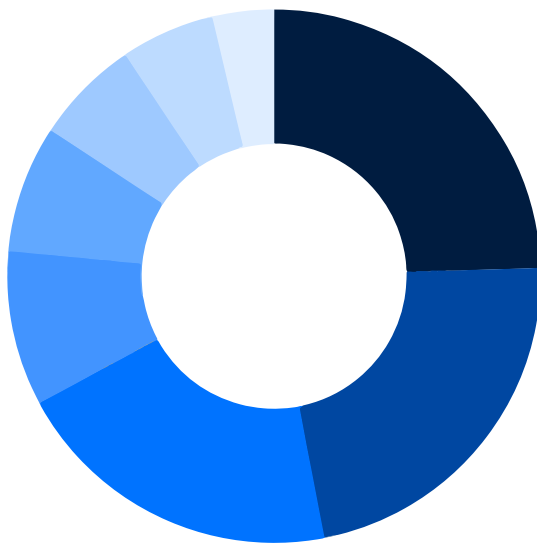
Management Views on Needs

We asked managers what their needs are to be productive while working remotely. Then we asked managers what they thought their employees' needs were.
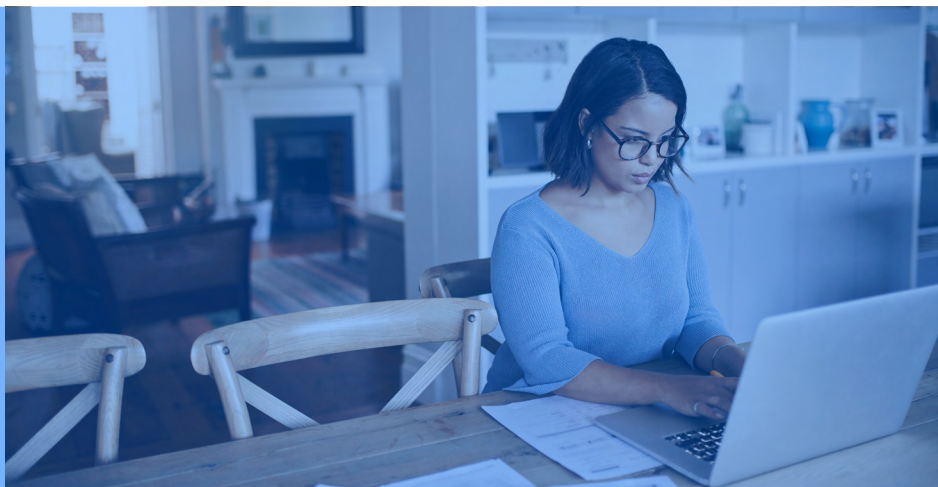
Managements' Needs to Be Productive Working from Home

73%	Collaborative colleagues
67%	Technology that helps me be successful
60%	Transparent communications from company leaders
28%	Fewer virtual meetings
23%	Take time off
19%	More virtual meetings
17%	Work less hours
11%	Other

For management, juggling the need to collaborate with colleagues was a top priority. Though technology was the second biggest need, comments from management respondents also highlighted a familiar struggle: balancing long hours with family or personal demands.

Employees seemed to know what their bosses needed to be productive. We asked them what they thought their direct bosses needed. They listed collaborative colleagues as the top need, followed by technology needs.
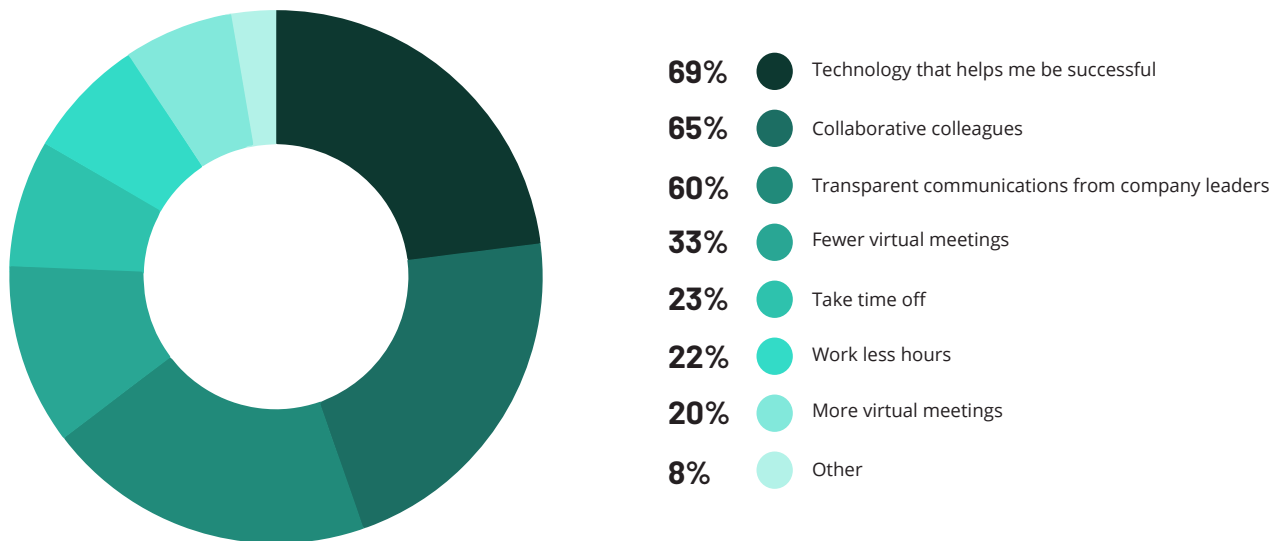
Employee View on Needs

Employees' and managers' needs don't vary much. Employees biggest need centers on having technology that helps them be productive.

Employees' Needs to Be Productive Working from Home

69% ● Technology that helps me be successful

65% ● Collaborative colleagues

60% ● Transparent communications from company leaders

33% ● Fewer virtual meetings

23% ● Take time off

22% ● Work less hours

20% ● More virtual meetings

8% ● Other

Managements' understanding of what employees need was also in line with what employees said. In our survey, managers said that employees' biggest need was technology. The second need, according to managers, was transparent communication. While this was slightly different from what employees said, both managers and employees are aligned with their understanding of each others' needs.

Insights

Companies can help managers adapt their leadership skills by providing training on topics such as leading through change, communication practices, and motivating employees.

Executives need to develop a strategy around helping employees manage the impacts of social isolation, anxiety, and depression. What's more, companies need to provide employees with resources and training on tactics to navigate the conflicts between work and their personal lives when working from home.

Technology was often selected as top challenges and needs for people to be productive. As companies mature their work from home policies, finding solutions to help improve WiFi signals, provide ergonomic at-home solutions will be important. These were the two most often cited problems related to technological disruptions to productivity.

Maturing Remote Work Practices

We asked survey respondents how ready they believed their company was to mature its remote work practices over the next six months.

Managements' Assessment

50% ● Ready
34% ● Mostly ready
11% ● Mostly unready
3% ● Don't know
1% ● Not ready
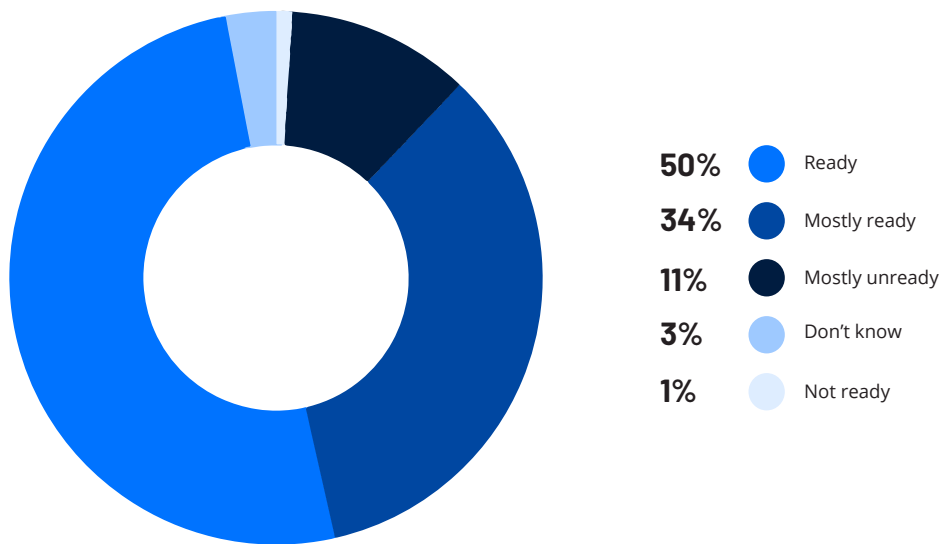
50% of management respondents believe that their company is ready to mature its remote work practices. While 35% believe their company is mostly ready.

When looking at remote work readiness by age group, the most optimistic were managers ages 55-64. 67% of managers in this age group say their companies are ready. In stark contrast, managers ages 35-44 were least optimistic. 37% feel that their company is ready to mature their remote work practices. However, 43% indicated that their company is mostly ready.
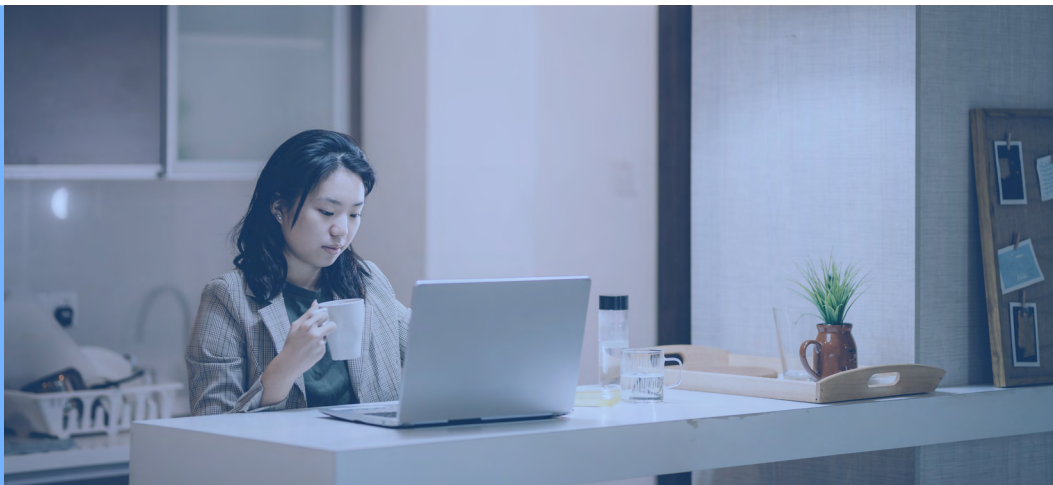
In comparison, here's what employees said.

Employee Assessment

58%	Ready
31%	Mostly ready
8%	Mostly unready
2%	Not ready
2%	Don't know
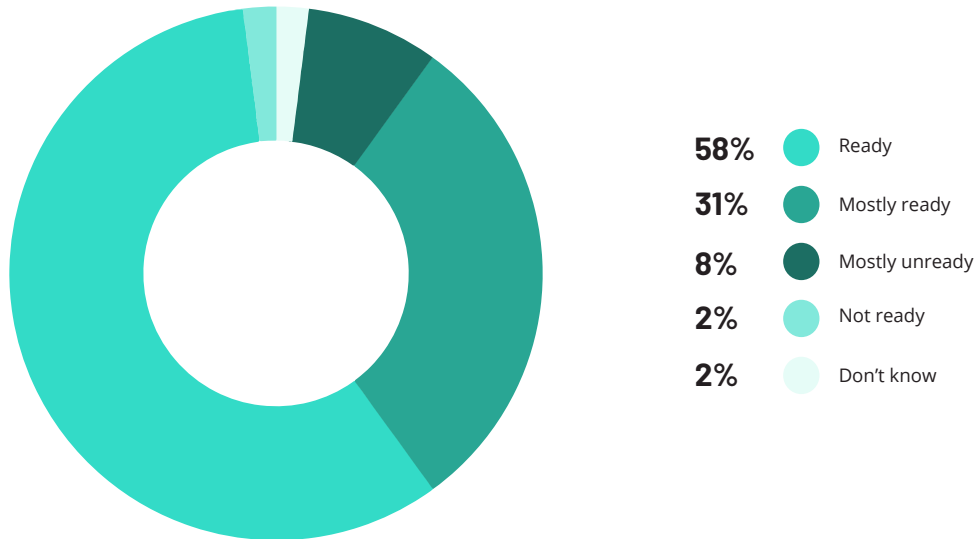
58% of employees believe that their company is ready to mature its remote work practices. 31% believe the company is mostly prepared, and 8% believe their company is mostly unready. On the whole, both management and employees are aligned on this question.

In reviewing the comments from both managers and employees, company culture was also a concern.

Culture Concerns

- Managers worried how the absence of shoulder-to-shoulder interactions are impacting employee morale

- The biggest concern, however, shared by managers and employees was misperceptions of employee's productivity

Low trust is at the core of the misperceptions. Respondents' comments show that leaders have not shifted their mindsets to consider working-from-home as an ongoing benefit. One manager said that company leaders need to trust employees more. The manager went on to say that technology and processes are already in place to allow people to continue to work from home.

Ultimately, respondents expressed concern that the company culture will revert to the way things were before COVID-19.

## COVID-19 Influence on Permanent Remote Work Practices

We also asked managers how likely it would be that remote work would remain a benefit after the COVID-19 shelter-in-place orders are lifted. 56% of managers say it's likely that their company would allow the workforce to work remotely. 21% say it's somewhat likely. 6% it's not likely at all.

Employee Assessment

56%	Likely
21%	Somewhat likely
12%	Somewhat unlikely
6%	Not likely
3%	Don't know
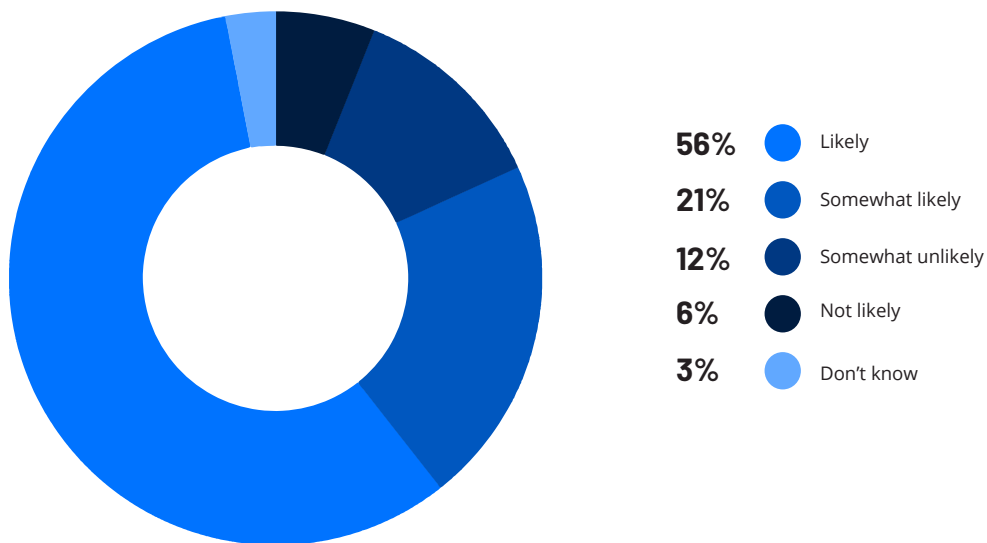
When we asked managers if they planned to make any teams permanently remote, the responses were almost evenly split.

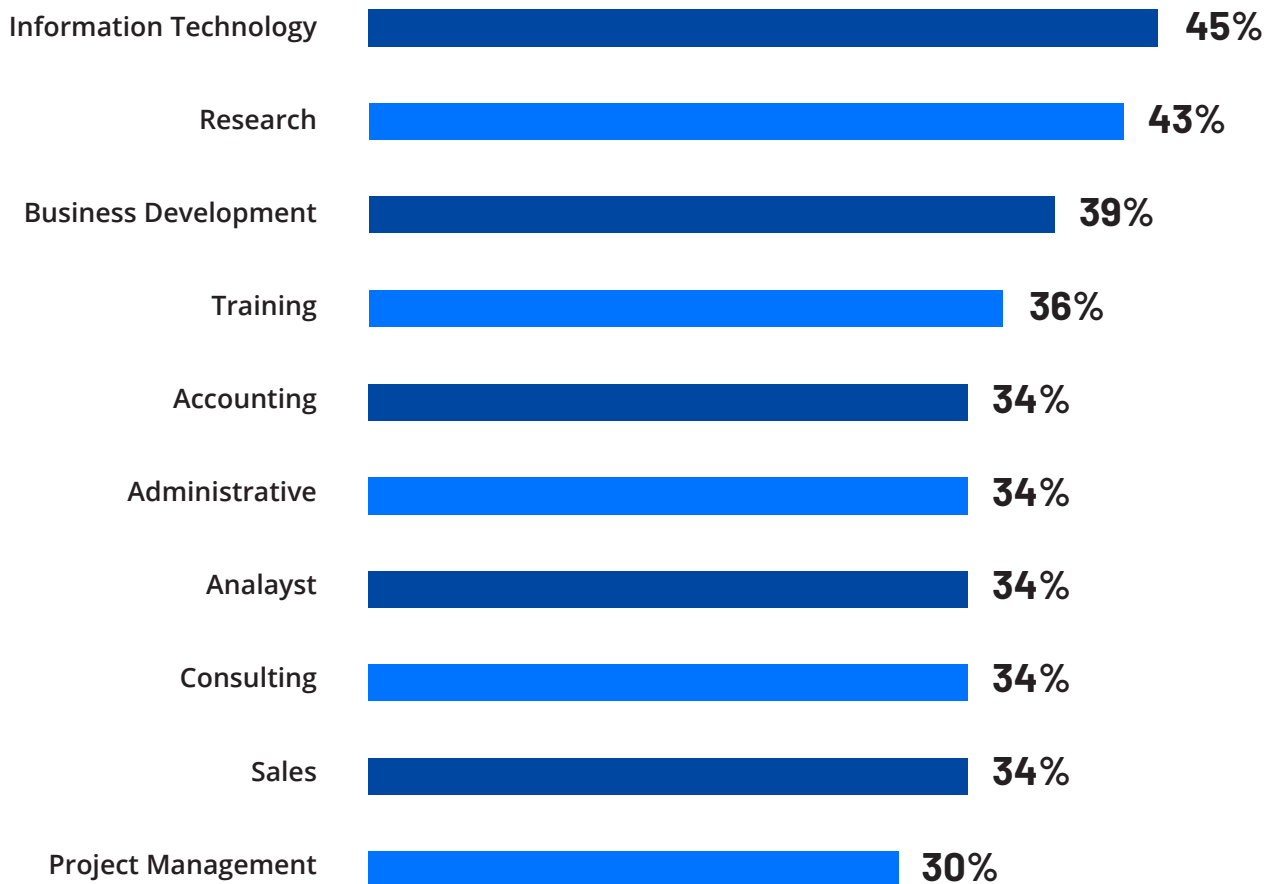34% indicated that they'd make some teams permanently remote. Meanwhile, 33% said they wouldn't, and 33% didn't know.

33%
I don't know

34%
Yes

33%
No
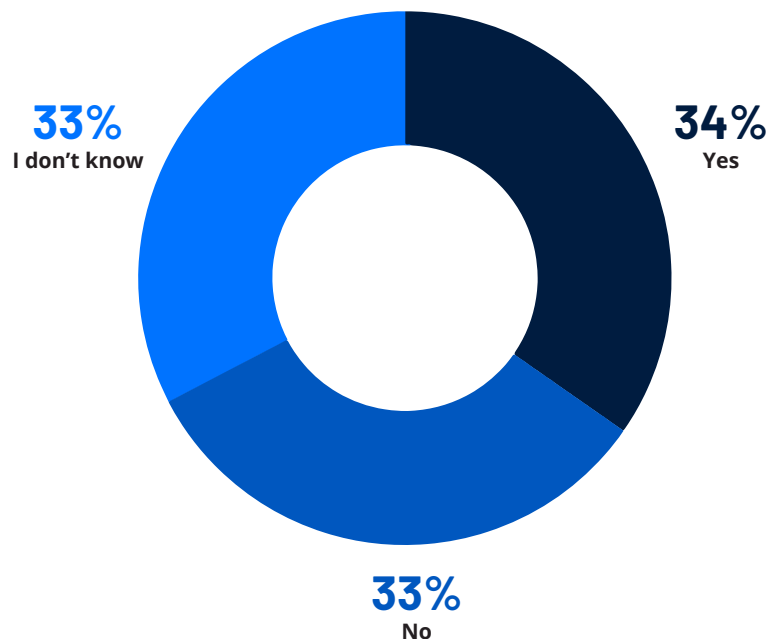
Here are the top ten job functions that companies anticipate would be 100% remote.

Top 10 Job Functions Anticipated to be 100% Remote

Job Function	Percentage
Information Technology	45%
Research	43%
Business Development	39%
Training	36%
Accounting	34%
Administrative	34%
Analayst	34%
Consulting	34%
Sales	34%
Project Management	30%

Insights

When it comes to integrating work-from-home policies and practices as a standard practice, the company's culture plays a key role. Executive management sets the tone for a company's culture. Therefore, the top leaders in a c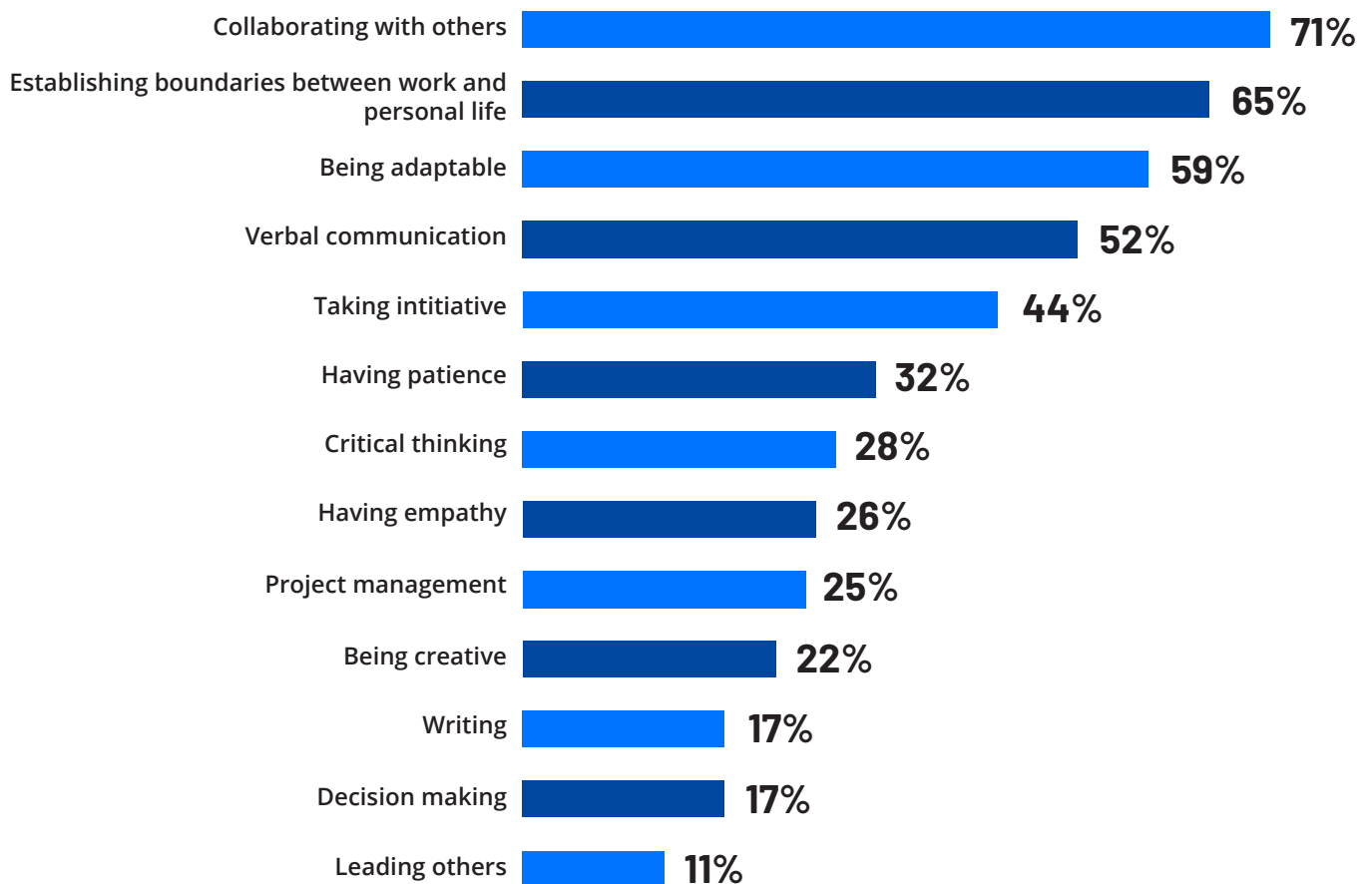ompany need to model how to build trust and be consistently transparent when communicating broadly. Equip managers with the skills needed to adapt to the new operating practices. Pay close attention to practices that build trust and transparency.

Skills to Effectively Work from Home

Working remotely places greater emphasis on soft skills. We asked managers and employees to identify the top five skills they believe are essential to work remotely effectively. The graph below shows the overall skills ranking. Then we show what managers and then employees said in separate graphs.

Overall Skills Ranking

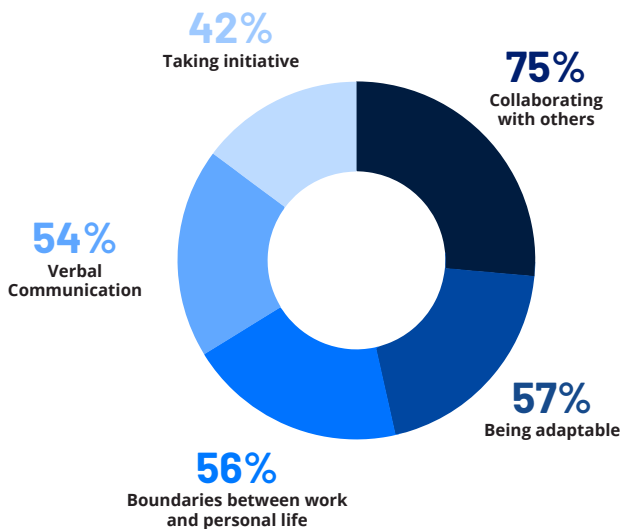| Skill	Percentage
Collaborating with others	71%
Establishing boundaries between work and personal life	65%
Being adaptable	59%
Verbal communication	52%
Taking intitiative	44%
Having patience	32%
Critical thinking	28%
Having empathy	26%
Project management	25%
Being creative	22%
Writing	17%
Decision making	17%
Leading others	11%

71% of managers and employees say collaboration was the most essential skill. 65% say that establishing boundaries between work 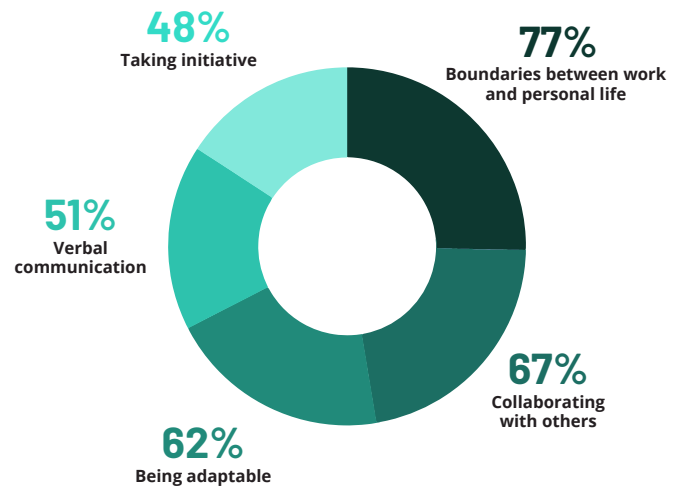and personal life is also crucial. 59% cite adaptability as the third most important skill, followed by verbal communication (53%) and taking the initiative (45%). Below is the full complete list of skills and their percentage of importance.

![Bluescape logo]

Managers' Views on Top Skills

42%
Taking initiative

75%
Collaborating with others

54%
Verbal Communication

57%
Being adaptable

56%
Boundaries between work and personal life

Employees' Views on Top Skills

48%
Taking initiative

77%
Boundaries between work and personal life

51%
Verbal communication

67%
Collaborating with others

62%
Being adaptable

Managers and employees agree on the top five skills. However, they differ in their rankings. The biggest difference is establishing boundaries between work and personal life. Employees continue to rank this as important despite struggling with it. For managers, this seems to be less of an issue. Interestingly, when evaluating the entire list of skills, leadership ranked last. It takes leadership to help employees find ways to find a healthy balance between their two worlds.

Survey respondents also added their ideas around the top skills. On the whole, the additions centered on time management and being organized.

Insights

Both managers and employees indicated that managing personal and work demands while working remotely was a top challenge. At the same time, both said it is a top skill to work remotely effectively. Companies need to help educate and provide resources to everyone on ways to meet

both worlds--home and work.

For company leaders, more in-depth training on how to coach employees to establish boundaries between their work and personal lives is key. What's more, leaders need to understand the wellbeing implications when employees struggle to reconcile how to be productive and care for their families. Remote work is a long term strategy. Companies that deepen management's leadership skillsets for this new normal will be best positioned to maximize the human capital value associated with remote work practices.

There is an interesting dynamic between what managers listed as their top challenge in leading remote teams and the skills needed to lead them. The top challenge is adapting their leadership style. However, the skill they list as least important in leading remote teams is leadership. Bottom line, leaders are struggling. Companies that keep some or all of their remote work practices and policies also need to invest in training leaders to lead remotely effectively.

Remote Work and Its Influence on Wellbeing

Tired. Lonely. Stressed. Anxious. The most prominent theme in our research is about wellbeing and how remote work undermines it. However, in some cases managers find the flexible work arrangement satisfying. Both managers and employees struggle with establishing boundaries when working from home. We wanted to know the implications. The following graphs reveal the overall results. We then breakdown the results by management and employees.
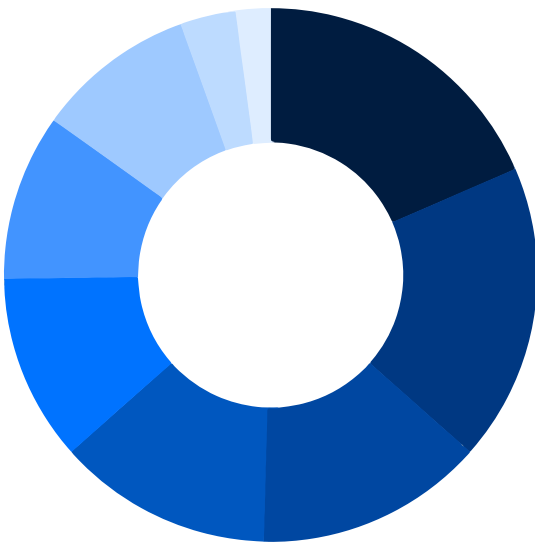
44% I work long hours and am tired
43% I feel lonely at times
33% I'm happier
31% It's hard to focus
27% I feel stressed
24% I'm more energized
23% It doesn't impact my wellbeing
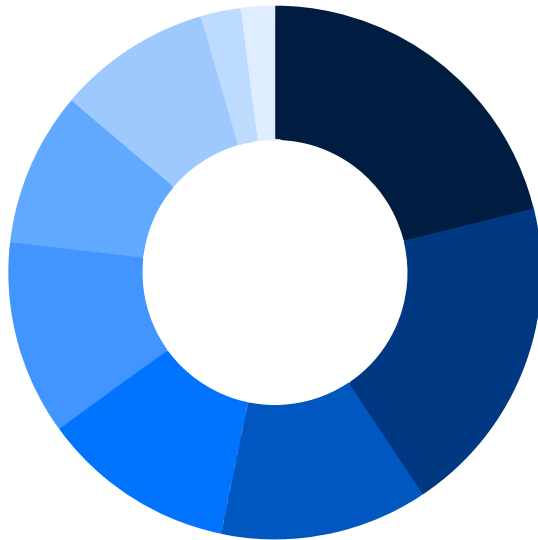**8%** I don't know
5% I'm unhappy

It's common for managers and employees to work longer hours when working remotely. 44% say this is the biggest impact on their wellbeing, leaving them feeling tired. Feeling lonely (43%) was the second biggest influence on the workforces' wellbeing. Interestingly enough, quite a few respondents feel happier when working remotely (33%).
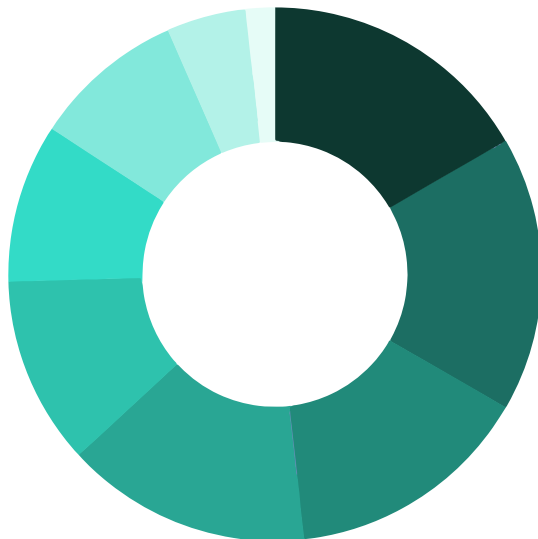
Remote Work Impacts on Managers' Wellbeing

%		
52%	●	I work long hours and am tired
48%	●	I feel lonely at times
31%	●	I feel stressed
29%	●	I'm happier
29%	●	It's hard to focus
23%	●	I'm more energized
23%	●	It doesn't impact my wellbeing
6%	●	I'm unhappy
5%	●	I don't know

Remote Work Impacts on Employees' Wellbeing

%		
38%	●	I feel lonely at times
38%	●	I'm happier
34%	●	It's hard to focus
34%	●	I work long hours and am tried
26%	●	I'm more energized
22%	●	It doesn't impact my wellbeing
21%	●	I feel stressed
11%	●	I don't know
4%	●	I'm unhappy

For the most part, managers and employees feel similarly about working remotely and the impact on their wellbeing. There are some notable differences, however.

Remote Work Impacts

- Employees placed feeling lonely (38%) as their top wellbeing concern. Managers' input made loneliness the group's second wellbeing concern (48%).
- Interestingly, 48% of employees ages 45-54 say they are happier when working remotely. No other age group placed happiness as the top influence on their wellbeing when working remotely. What's more, 26% of managers in this age group are energized by working from home.
- Managers' top concern was the number of hours they worked and feeling tired as a result (52%). Employees ranked this as the fourth biggest wellbeing concern (34%).
- Managers and employees also differ in their happiness. Employees are happier working remotely (38%). Meanwhile, 29% of managers feel happier working from home.
- It's noteworthy that some managers (23%) and employees (22%) don't believe remote work impacts their wellbeing.

Insights

Companies need to develop a comprehensive solution to addressing employee wellbeing as a result of remote work arrangements. If ignored, companies could see an increase in benefit costs, at a minimum, as employees struggle to find healthy practices to counter the effects of not seeing colleagues in person.
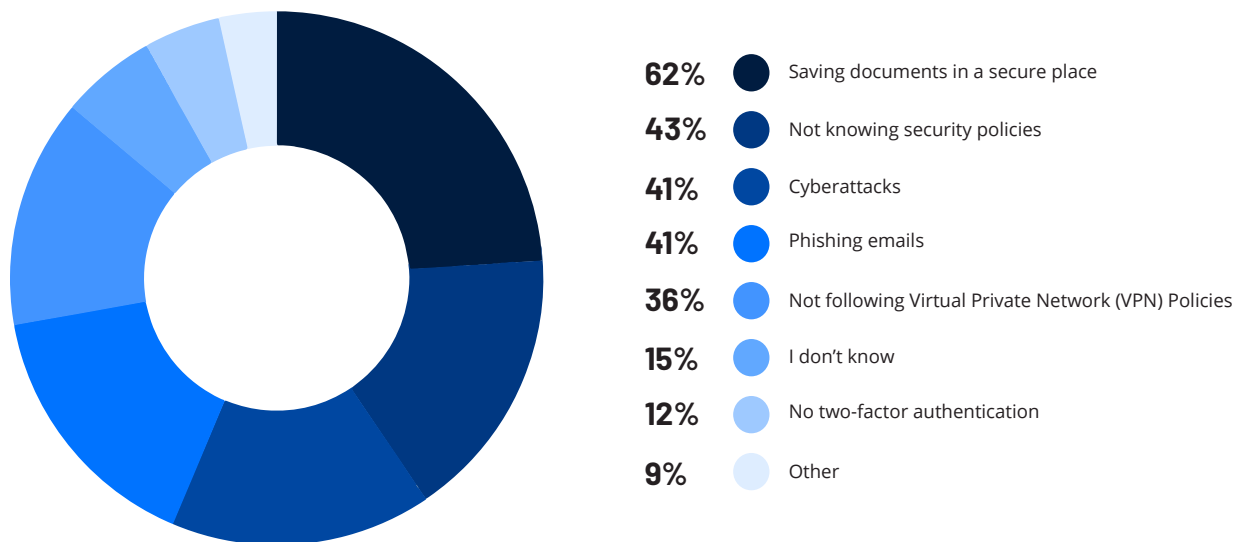
Companies were already struggling with employee burnout and feelings of being overwhelmed. Layer on loneliness, stress, and anxiety, employee productivity will be adversely affected.

Remote Work Security Needs and Tools

We asked managers what their top three security concerns were. Working remotely presents added layers of security complexity: ensuring data is protected and saving documents in secured locations. Here is the stack ranking of security concerns shared by managers.

62% ●	Saving documents in a secure place
43% ●	Not knowing security policies
41% ●	Cyberattacks
41% ●	Phishing emails
36% ●	Not following Virtual Private Network (VPN) Policies
15% ●	I don't know
12% ●	No two-factor authentication
9% ●	Other

The top concern for managers is document security. 62% worry that company documents may not be securely saved. It's hard for managers to ensure employees do work on work-only devices. Transferring documents between personal and work devices can expose the company to unnecessary security risks. Adding to the complexity, 43% of managers worry that employees don't know the company's security policies. 42% worried about cyberattacks. Phishing scams (41%) and not following VPN policies (36%) round out the top five concerns.

even more critical. Company executives and IT need to establish clear protocols to protect company assets, data, and intellectual property. Implementing technology solutions with the top ISO rating can help companies add security protections that protect a mostly remote workforce.
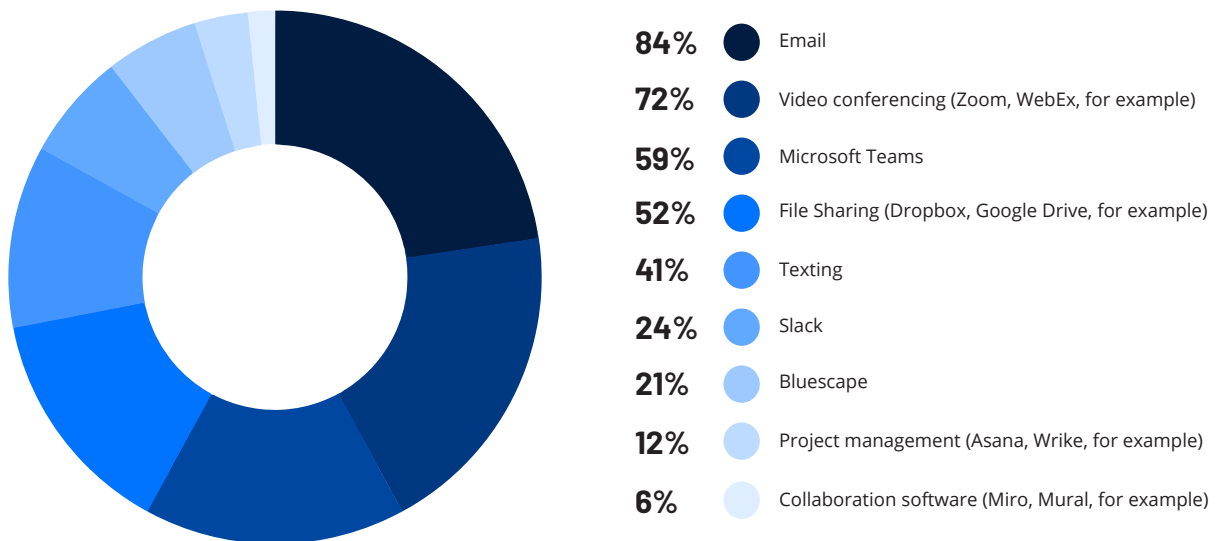
Purchasing a secure solution and helping remote employees do their work and collaborate with colleagues is important. Virtual work platforms, like Bluescape, help employees do their work and share it securely with others no matter where they are.

Insights

As remote work increasingly becomes standard practice for companies, security training becomes

Remote Work Tools

One survey respondent wrote, "It would be nice to have all tools 'talk' with each other without having to be in 20 different apps…" This is the conundrum with how we work today. Remote working adds a layer of complexity to this challenge. Too many tools, files, and tabs plague effortless workflows. This is a challenge that will need to be solved as remote work arrangements remain a workforce benefit.

Managers and employees said email was the most preferred tool (84%). It's not surprising that video conferencing was cited as the second most preferred tool (72%). Specific tools that augment collaboration and communication were then listed as key tools to remote workers. Surprisingly, only 24% of respondents said Slack was important to working remotely.

84% Email

72% Video conferencing (Zoom, WebEx, for example)

59% Microsoft Teams

52% File Sharing (Dropbox, Google Drive, for example)

41% Texting

24% Slack

21% Bluescape

12% Project management (Asana, Wrike, for example)

6% Collaboration software (Miro, Mural, for example)

Closing

The results from our first annual remote work survey revealed these major themes:

1. Managers and employees highly desire remote work. However, it comes at a cost--wellbeing and productivity. As companies mature their understanding of how to support remote employees, these concerns will likely lessen. Executives need to take action to mitigate the adverse effects of loneliness, long hours, and struggling to establish boundaries between work and personal life.

2. Survey respondents indicate that their company is ready to adopt a permanent remote work solution.

3. Conversely, not all respondents felt optimistic about permanently working remotely. Once the shelter-in-place orders are lifted, respondents worry about losing the benefits of remote work, including getting more work done due to fewer distractions. A company's decision to keep or rescind the flexible work arrangement will impact the culture, including employee morale and trust levels between management and employees.

4. Though our survey revealed that leadership skills are the least important to remote work, other responses to our survey questions indicate something different. The workforce will be a mix of remote and onsite employees. It takes leadership to maintain the company's culture for these two realities. What's more,

transparent communication, motivating employees, leading through change, and coaching employees to establish healthy boundaries between work and life also require leadership skills. If anything, great leadership is the top skill for managers to grow.

5. When it comes to tools to help the workforce be productive, companies and their IT departments will need to mature its support services. Additionally, purchasing a virtual work platform, like Bluescape, that integrates with the most common tools that employees use needs to be on all purchasing officers' plans for 2021.

6. Finally, companies this year had to shift their workforce to working remotely. This change happened swiftly and almost overnight. That said, our 2020 survey revealed that managers and employees were fairly aligned on most topics we measured. This is good. Assuming executives mature remote work operations and train the entire workforce to adapt to this new reality, we anticipate seeing greater alignment in 2021 between how managers and employees view working from home.

BLUESCAPE ®

Bluescape makes remote work actually work for enterprises.

From integrated video conferencing for team communications, to virtual whiteboards for collaboration with others, Bluescape helps virtual teams be more successful and feel more connected. Compatibility with common productivity tools ensure employees have the right technology to be productive. And Bluescape meets the most stringent InfoSec requirements so you can be confident your documents are secure.

Bluescape is the virtual work platform of choice for corporations with a global footprint and government organizations. Contact us today to discuss how Bluescape can meet your remote work needs.

Contact us today to discuss how Bluescape can replicate the in-person experience to meet your remote-work needs.

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1-888-507-0030

Appendix

Overview

There are two groups that we studied: managers and employees. Managers consist of the C-suite, SVPs, VPs, Directors, and managers. Employees are considered non-management.

Of the nearly four hundred respondents, 29% are ages 45-54. 23% are ages 55-64. The third largest response group (20%) was from those ages 35-44.

75% of respondents, managers and employees combined, said they like working remotely. Breaking down the data by respondent type, 71% of managers indicated that they like working remotely. 79% of employees like working remotely.

Top Job Functions Anticipated to be 100% Remote (Expanded)   Page 9

On page 9 we listed the top job functions survey respondents listed as likely to be 100% remote. The following is the complete list.

Information Technology	45%
Research	43%
Business Development	39%
Training	36%
Accounting	34%
Administrative	34%
Analyst	34%
Consulting	34%
Sales	34%
Project Managment	30%
Art/Creative/Design	27%
Customer Service	27%
Finance	27%
Advertising/Marketing	25%
Purchasing	25%
General Business	23%
Human Resources	23%
Education	20%
Legal	20%
Strategy/Planning	18%
Quality Assurance	16%
Engineering	14%
Product Management	14%
Public Relations	14%
Supply Chain	11%
Science	7%