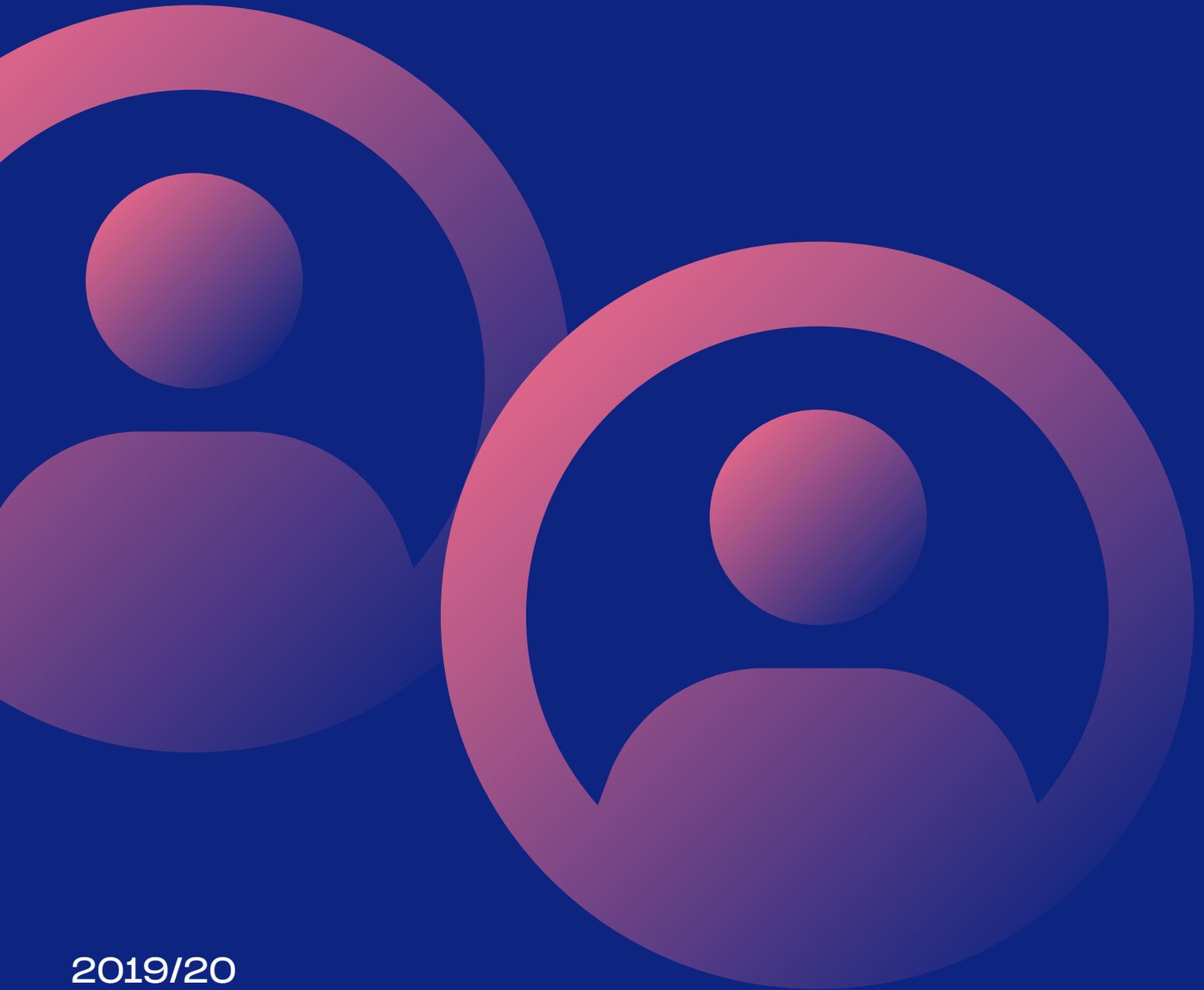


The State of Collaboration



2019/20

A global, independent survey
of IT and business leaders



Foreword

The way we work is broken.

The very technology that has helped us to advance and innovate as well as saved us time and brought us closer together has devolved into a mess of tools that have made it difficult to focus and work collaboratively.

Just look at the typical workday now; employees are switching between an average of 35 tools¹, thereby creating fragmentation and distractions for our teams.

At Dropbox, we're building a new vision for the way teams work together with an approach that does not add more tools, but rather makes tools work smarter. This is critical, as employees are wasting over a quarter of their workday on tasks that don't add value to the business, like switching between those dozens of apps on their phones and laptops or searching for the files that they need.

The research we conducted amplifies just how big of a challenge business and IT leaders are facing in the workplace, but it also uncovers an incredible appetite for solutions.

As much as the prospect of a streamlined, focused future is appealing, it's clear that businesses first need to stop, hit restart, and work with solutions that quieten down the noise of change, not add to it.

We all need a starting point, so I hope you find our research both inspirational and useful, after all, we've done it for you!

Timothy Young

SVP & GM, Dropbox Core

¹<https://www.pegacom/insights/resources/demystifying-desk-top-what-workforce-intelligence-reveals-about-technology-and>



Introduction

You don't need a rocket scientist to explain the changes that the workplace has undergone these last ten years, as there's a chance your 'urgent to-do' list will suffice.

According to the research we conducted, it's likely that some of the biggest challenges that you're facing right now are connected to the fragmented ways your teams are working today.

Achieving a collaborative way of working is key, with our respondents agreeing that getting the most out of every collaboration and giving employees the freedom and opportunity to effectively work together on tasks will add critical business value. The benefit that organizations can see if they do this successfully is enormous, and the risks that might occur if they don't are equally impactful.

This research explores the extent of the problem that business leaders are facing, and the impact it's having on your peers – but it also uncovers the level of focus now being placed on resolving the problem.

Unless otherwise indicated, the results discussed are based on the total sample.

For more information on Dropbox Business, contact sales@dropbox.com or visit dropbox.com/business



Key findings

What have we learned?



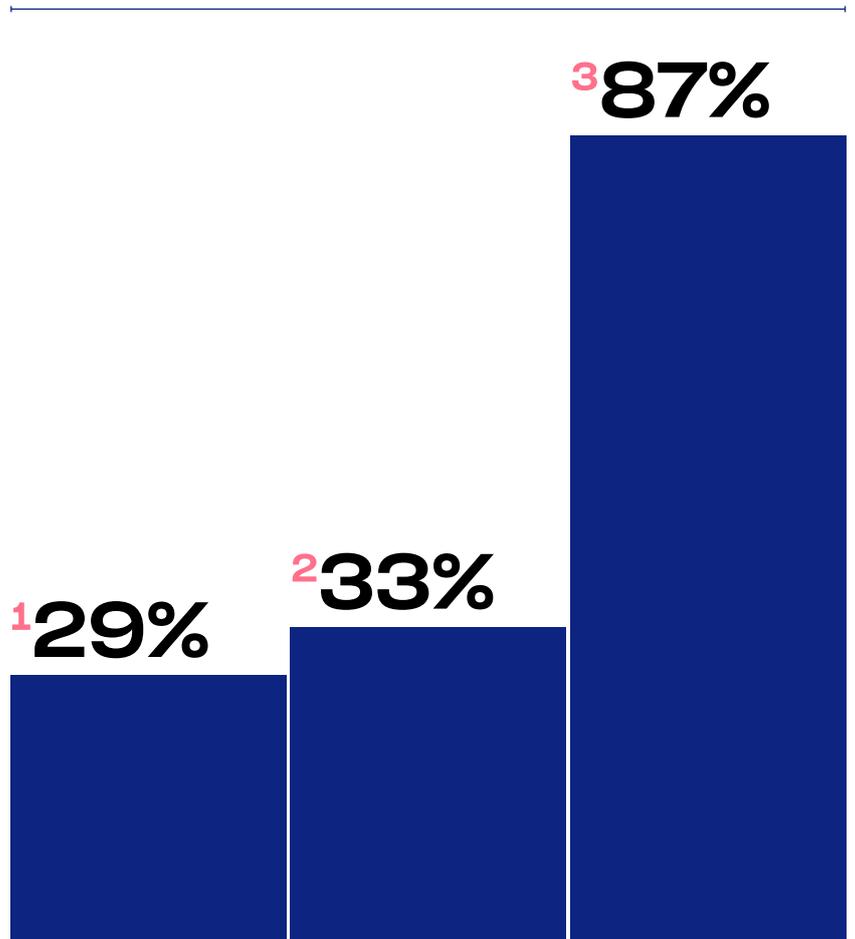
01

At many organizations, the current way of working is making employees less productive. A more collaborative culture could be the solution.

¹On average, respondents believe that they waste **29%** of their time at work on tasks that don't add value

²While **33%** say that increasing employee productivity is a main priority for the next 12 months

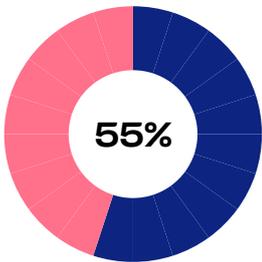
³But in order to do this, **87%** say that they need the ability to meet the varying collaborative working needs of different teams



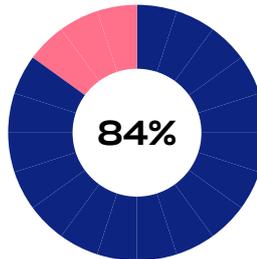


Key findings – 02

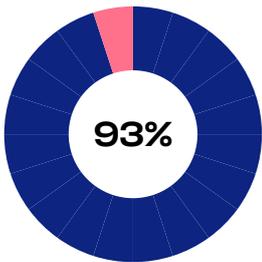
Moving toward a more collaborative working culture will not necessarily be the easiest of journeys, but it will certainly be worth the effort.



Recognizing the problem is a good start – **55%** believe that significant or large improvements are needed when it comes to collaborative working across teams



This cannot go on – in fact, **84%** realize that the overall success of their organization depends on them reinventing the way that teams collaborate

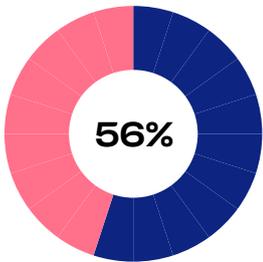


Despite the challenges that could arise as a result of this need for improvement, **93%** are still experiencing barriers to improving collaborative working, most commonly battling employee culture/attitudes

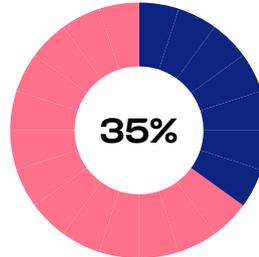


Key findings – 03

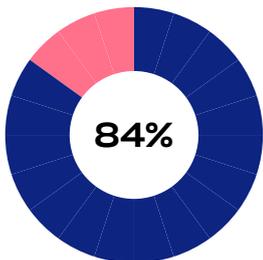
A connected workspace, which brings together people, tools content, and the conversations around them, lays the groundwork of a collaborative culture, while driving the organization forward in the process.



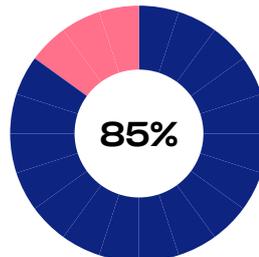
According to **56%**, significant or large improvements are required when it comes to creating a single workspace



Understandably then, collaboration tools are among the biggest investment priorities for **35%** over the next 12-24 months



It's money well prioritized for the **84%** who believe that investment in a connected workspace will improve the way that employees collaborate



This investment can be the key to overall success – **85%** say that a connected workspace connecting their content/ tools/teams would improve the business results and the way that teams work



Section one: Current ways of working

01



There are some tasks at work that are unavoidable but that doesn't mean they should be standing in the way of the work that is truly important to the individual and valuable to the organization.

Monotonous admin is starving businesses of innovation; it's apparent that decision makers in the modern workplace are spending too much time on administrative tasks, which is preventing them from spending time on creative activities. Could their time be put to better use?

The obvious answer is yes! Innovative, creative tasks can propel an organization ahead of even their closest competitors, so unquestionably, these should be prioritized.

On average, surveyed decision makers are spending 26% of their workday on email related tasks and meetings.

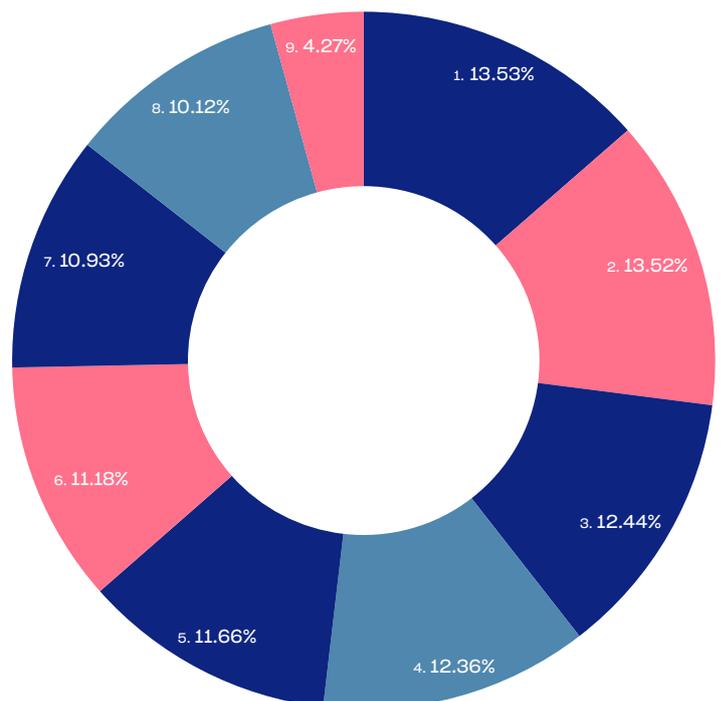
While this is only slightly more than the proportion of time being spent on strategy, planning, creative tasks, innovation, and brainstorming (25%), realistically the latter should be much higher.

Particularly when considering that other non-business critical tasks are swallowing up a further 45% of respondents' average workday.



“What percentage of your time, during an average working day, do you spend on the following tasks?” was asked posed to all of the respondents (2,500), while excluding from the averages those who selected “Don't know” (2%)

1. Meetings (face to face, online, or telephone)
2. Strategy and planning
3. Email administration/reading/writing filing
4. Using communication tools to reach people
5. Creative tasks, innovation, and brainstorming
6. Creation and curation of files, content, or data
7. Giving/receiving feedback or asking for/responding to requests for help/advice
8. Searching for, retrieval and distribution of files, content, or data
9. Other tasks



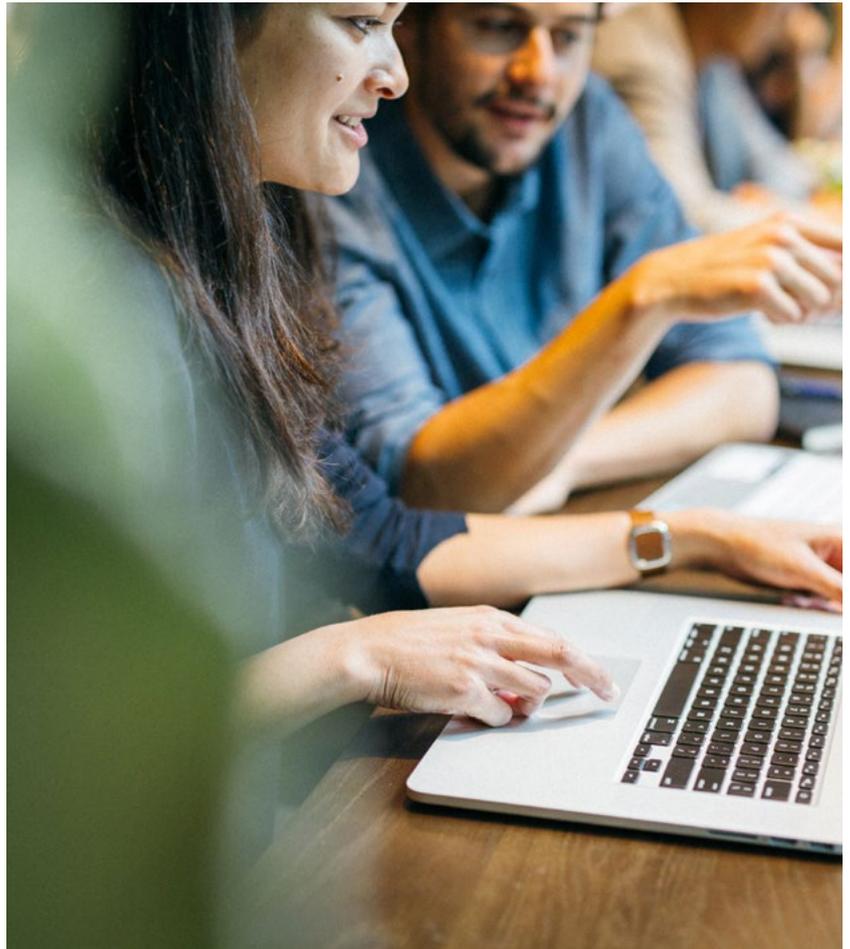


Predominantly these tasks also have an internal focus, which indicates that tedious internal processes and practices are blocking decision makers from getting around to the work that can really benefit their organization and its customers. Therefore, it is unsurprising that, on average, respondents believe 29% of the time that they spend at work is wasted on tasks that don't add critical value to the organization.

With decision makers being so time poor, it's of paramount importance that organizations can reduce this waste and maximize the amount of time that their decision makers are allocating toward creative and innovative activities. Do this and positive business results will follow.

Organizations have clearly identified this waste and are looking to change it – 33% of respondents report that increasing employee productivity is among the main priorities for their team over the next 12 months.

One approach to addressing this challenge is to achieve a better understanding of the workforce and meet their needs. Approaching nine in ten (87%) say that if they hope to maximize productivity, then they need the ability to meet the varying collaborative working needs of different teams. A clear message then – collaborative working is going to be a big part of the productivity puzzle.



There are so many upsides to implementing a collaborative working culture, and the businesses who recognize this and take timely action to encourage it, will find themselves ahead of those that fail to recognize its importance.



Another good starting point would be to help employees effectively share relevant information on live projects – 84% agree that this is integral to employee productivity in their organization.

Simplifying the way in which employees and teams work is another area that will almost certainly aid collaboration and thereby productivity. This is a key priority for 28% of the respondents' departments over the next 12 months, indicating that, while there is further work to do for many, it is already on the radar of these businesses.

It is critical that they do eventually find a solution because 85% of the surveyed decision makers agree that streamlining tool and app usage will help them to work smarter. These types of improvements will not only benefit productivity but can also have a positive secondary impact for employee satisfaction and morale.

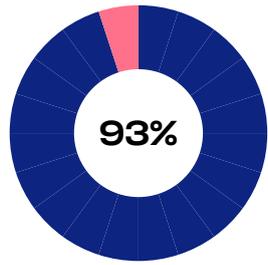
Undeniably, organizations have productivity and simplification issues that need to be addressed and this means that they can't afford to ignore the importance of good collaborative working any longer.



←
33% of the respondents report that increasing employee productivity is among the main priorities for their team

Section two:
**Collaborative
working –
the need to
do it better**

02



Report their organization is still encountering barriers when it comes to improving collaborative working

Given the aforementioned productivity and simplification difficulties that organizations are looking to tackle, it is no wonder that solving the collaboration dilemma is fast becoming a top priority for many.

According to nearly a third (30%) of the respondents, working more collaboratively with colleagues in their own team is among their department's top three priorities over the next 12 months, while well over half (55%) believe that significant or large improvements are required when it comes to collaborative working internally and externally across all teams. These organizations must rectify their situation – collaboration is a force for good, without it, many organizations struggle.

A case in point is almost four in ten (37%) cite employee productivity as being among the areas to have suffered the most as a result of collaboration difficulties, while a similar proportion (34%) points toward employee satisfaction/morale as an area to have taken a hit. However, it doesn't stop there, with 24% placing customer service among the most affected areas and the same proportion citing innovation.

If these impacts continue working in tandem with each other, then it could prove very serious for businesses with poor collaborative practices, but if these issues can be ironed out, the impacts are all avoidable.

Considering the potential consequences, it is almost unbelievable that the vast majority (93%) report that their organization is still encountering barriers when it comes to improving collaborative working.

Culture and employee attitudes can often be difficult to change, but with this being the most common barrier (36%) more can be done to showcase the benefits of collaborative working to the business, and more importantly, the staff themselves. Just over two thirds (68%) of respondents believe that colleagues in their own department need to place more importance on collaborative working, with slightly fewer (65%) saying the same for colleagues in other departments or teams.



What is truly eye-opening, is the 22% of the respondents who report that the c-suite in their organization does not see collaborative working as a key business driver. These organizational leaders should have total visibility over areas such as productivity, employee morale, customer service, and innovation, and as a result should be in the best position to see how great collaborative working can directly impact each one.

Most respondents have already made this connection and are looking for top down encouragement, with 83% believing that the c-suite should place more emphasis on the importance of good collaborative working.

While many recognize that various departments need to increase the significance placed upon collaborative working, it seems that getting this message across is the tricky part.

Just 13% report that no single department is responsible for creating a more collaborative working culture and that everyone plays a role, while 40% are happy to say that this is the IT department's responsibility.

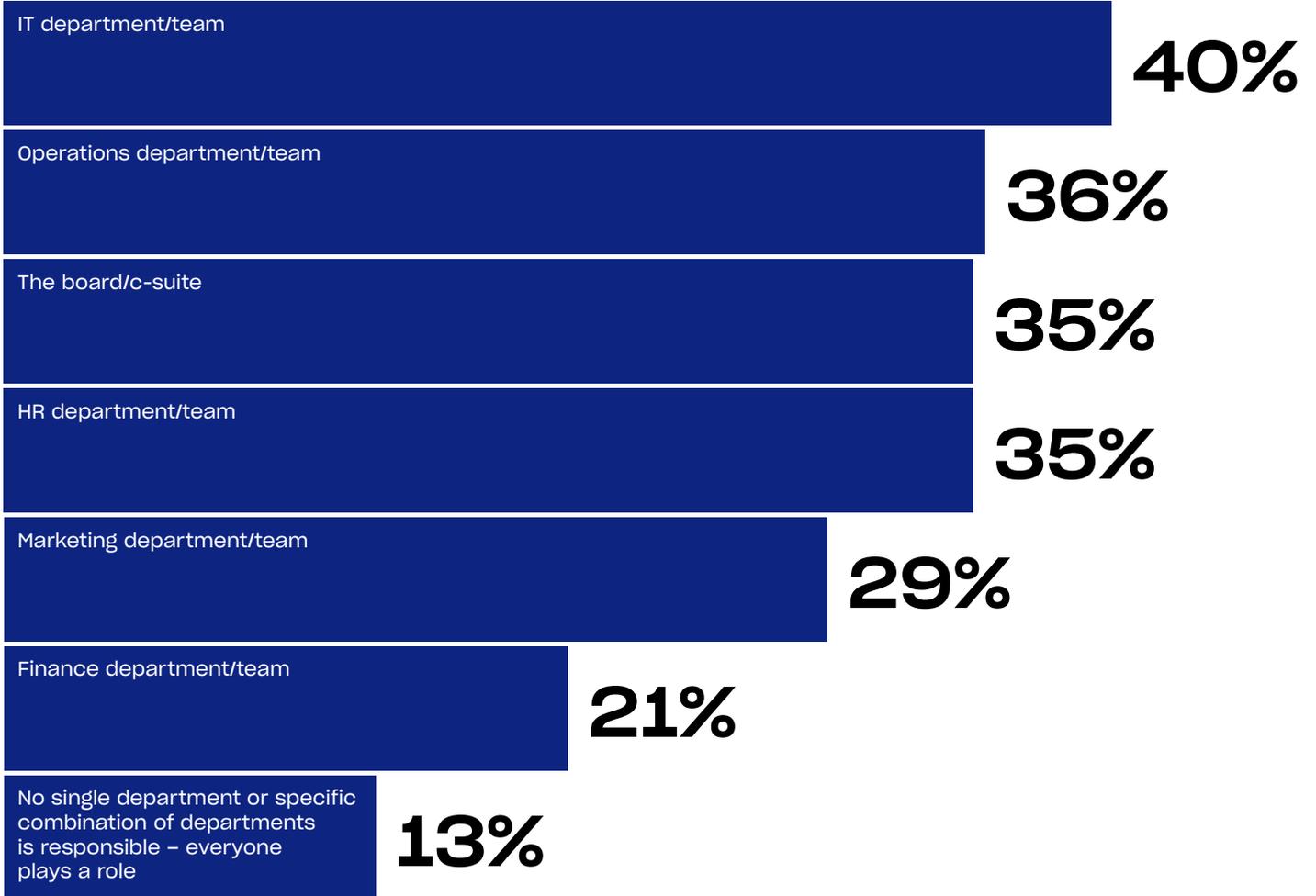
This attitude contradicts the very definition of collaboration. Technology will undoubtedly play a huge role in a successful transition to implementing a more collaborative culture, but putting this on the shoulders of one, or even two departments, is not going to provide the results that organizations need to see.

No matter how businesses get there, the journey will be worth the reward – 84% of surveyed decision makers agree that the overall success of their organization depends on them reinventing the way that teams collaborate both internally and externally.

The business case is crystal clear. For those who are yet to enter the race for better workplace collaboration, there is no time like the present, and for those encountering difficulties, the benefits will be worthwhile. You could even say that the future of their business depends on it.



“Which departments/teams do you believe are responsible for creating a more collaborative working culture in your organization?”
asked to all respondents (2,500)





Section three: Building a connected workspace for the future

03



- How can my organization eliminate the issues that we have experienced as a result of sub-standard collaboration?
- How can we overcome the barriers that are preventing us from implementing a collaborative working culture?
- How can we extract more value from our collaborations?

All are valid questions and the answers can be broken down into three key areas – people, processes, and technology.

We have seen that tedious internal processes and tasks are dragging decision makers away from the work that they should be doing. And it has also been shown that employee culture is an issue, coupled with the fact that various organizational areas are not placing enough importance on collaboration.

There is, however, a desire for simplified workflows. Therefore, the answer to all of the above problems may lie with the technology.

Currently, 56% of surveyed decision makers believe that significant or large improvements are required when it comes to creating a single workspace that unifies their content, tools, and teams.

This provides a starting point – things aren't perfect, but organizations are looking to make a change.

More than a third (35%) report that collaboration tools are among their organization's biggest investment priorities over the next 12-24 months, which is only slightly under the proportion prioritizing information security (36%).



This is exactly the level of importance that businesses must continue to place on collaboration tools if they hope to reap the rewards – and those rewards are significant.

More than eight in ten (82%) believe that in order to successfully innovate, their organization must first increase investment in a workspace that unifies their content, tools, and teams. Innovation is being restricted by monotonous admin, and here lies a possible solution.

Furthermore, 86% agree that a connected workspace for teams would make work easier, better, and more enjoyable. This will help to address the employee culture difficulties that many have been experiencing. Therefore, people and process related challenges can be minimized by using a connected workspace, but what about specifically improving collaboration?

A connected workspace also has the answers here, according to the 84% who believe that investment in such a workspace will improve the way that employees at their organization collaborate internally and externally.

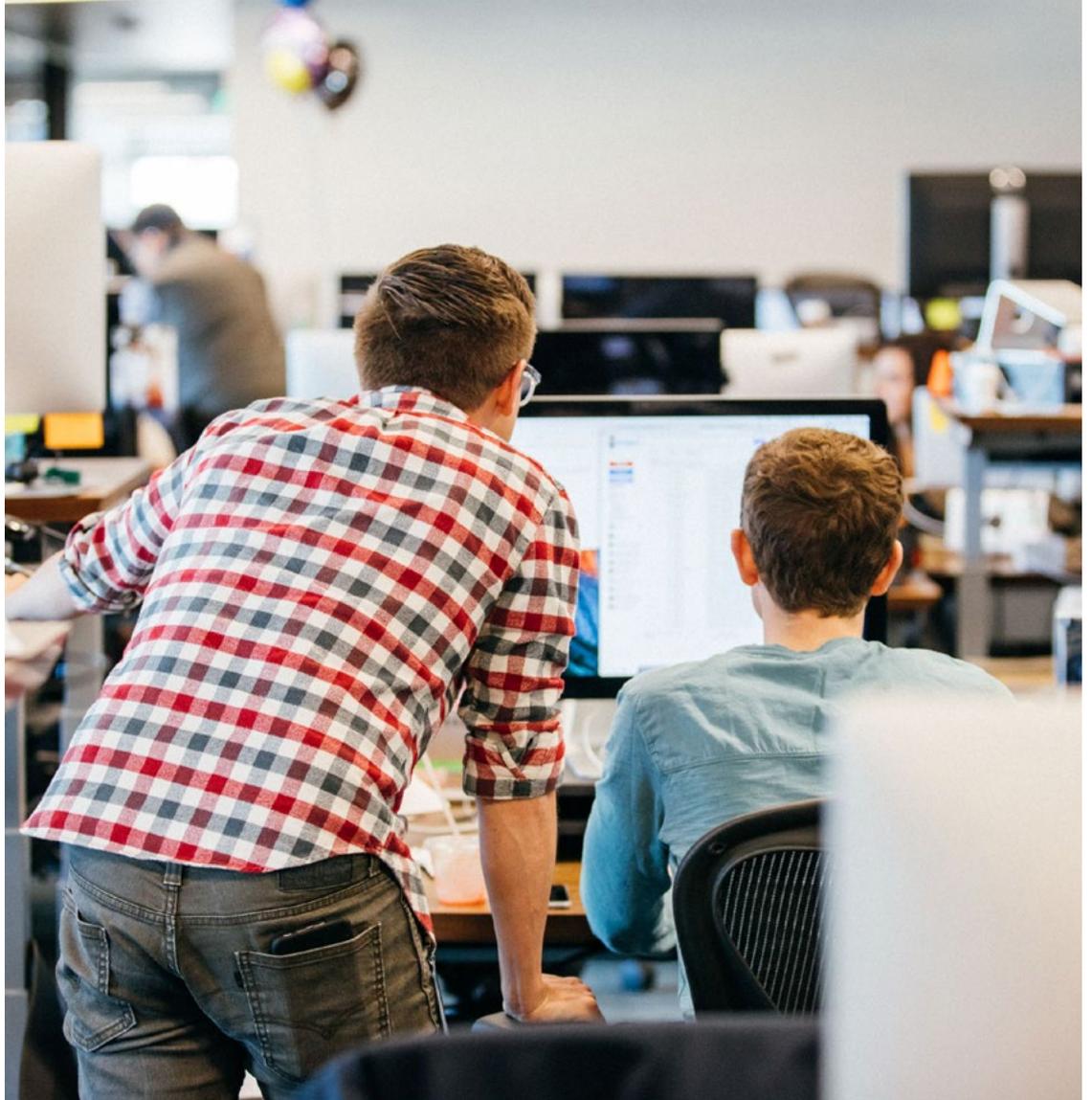


“Which of the following are the biggest investment priorities for your organization over the next 12-24 months? Combination of responses ranked first, second, and third” posed to all of the respondents (2,500)





→
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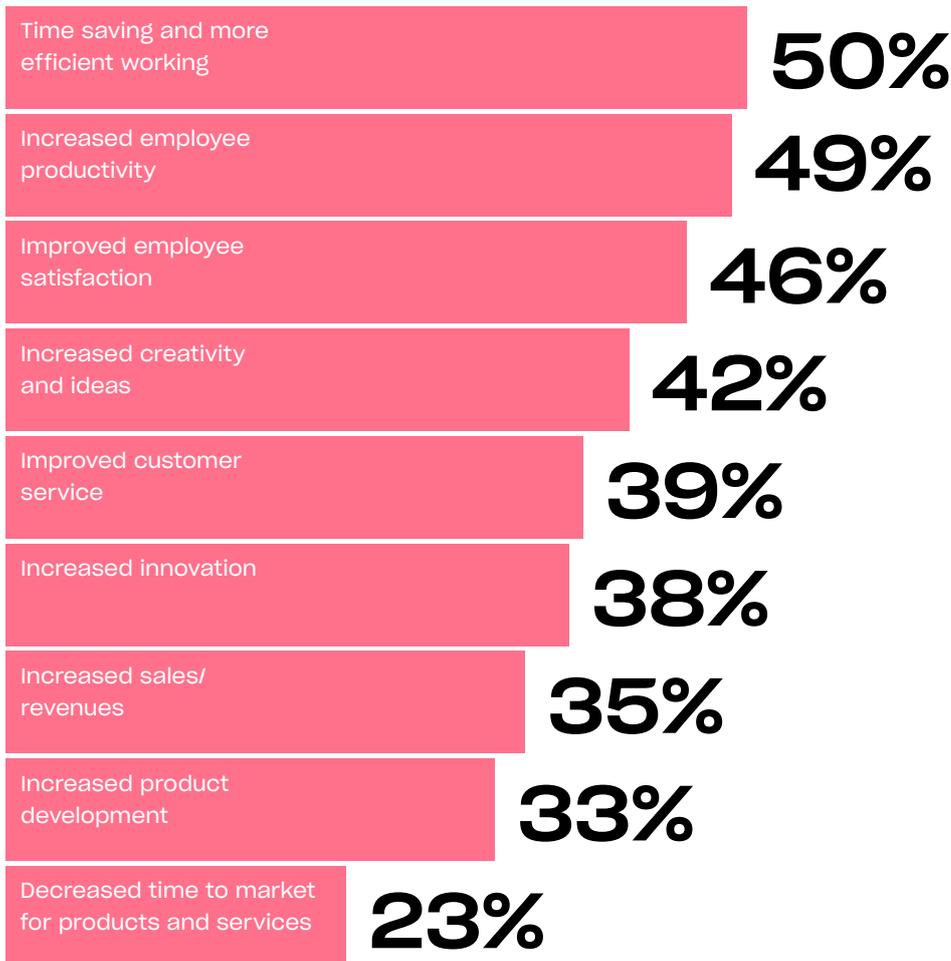




In addition, 83% think that a more unified approach to working will break down information silos that are inhibiting their organization from enhancing its collaborative culture. Information silos are not conducive to good collaboration and often cause a whole host of other difficulties, which now makes it clear why so many have witnessed missed deadlines, opportunities, and employee tensions as a result of poor collaboration.

And if any further endorsement is needed for a connected workspace, then there is always the 85% of surveyed decision makers who believe that business results and the way that teams work in their organization would be improved through the use of a connected workspace that connects their content/tools/teams.

Of those who believe this, 50% expect to see time savings and more efficient working as a result, while 49% anticipate increased employee productivity. With such a productivity crisis in organizations, these business benefits are too good to be ignored. Furthermore, 46% predict improved employee satisfaction, while substantial proportions foresee increased creativity and ideas (42%) as well as increased innovation (38%). It is clear then that a connected workspace can reach all facets of the business.





Conclusion

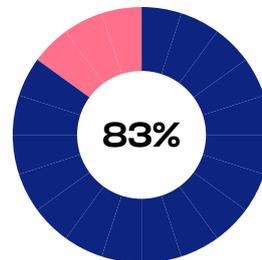
Organizational value and time is being lost by decision makers spending significant time and effort on non-critical tasks that do not add value to the organization. At a time when you're under pressure to deliver digital transformation initiatives, strategy and planning are being pushed aside in place of email, admin, and other monotonous tasks.

Connecting teams and retaining focus is now a top priority for the business leaders we surveyed, with many organizations now setting their sights on creating a more collaborative working culture that allows mobile, remote, and office based teams to work how they want.

Organizational change is regularly met with resistance from employees, however, and it's important to remember that increasing collaboration is no different. You as a leader must find a way to demonstrate the importance and value of best-in-class working practices: for the employees, business, and customers.

A connected workspace, which connects your content, tools, and teams is a first step. Giving people access to the resources that they need to do their job, in a single location, will lead to a happier, more dynamic, and a more productive workforce - working inside the security parameters that you control.

Benefits like these offer business impact and an opportunity to fix the broken workplace. Surely, a connected workspace is too good to ignore?



← **83%** think that a more unified approach to working will break down the information silos that are inhibiting their organization from enhancing its collaborative culture





Research methodology and scope

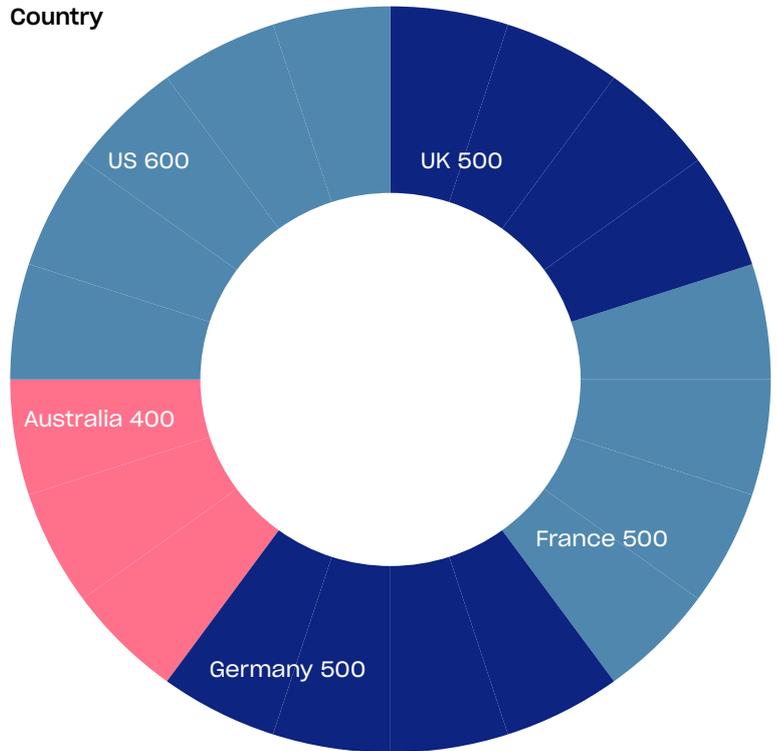


The research included the following number of interviews in each of the below countries and sectors:

Dropbox commissioned independent market research specialist Vanson Bourne to undertake the research upon which this whitepaper is based.

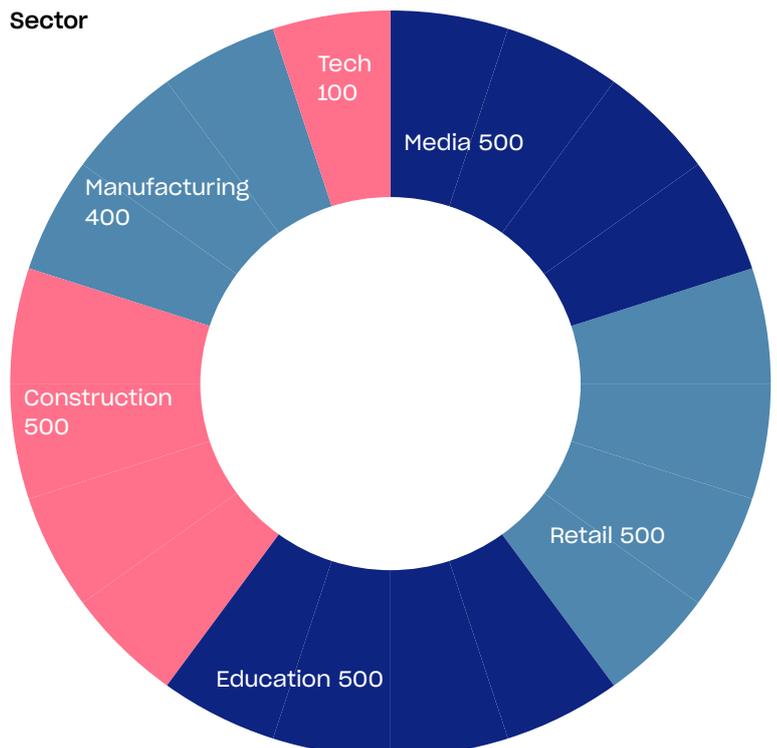
A total of 2,500 business and IT decision makers were interviewed during July and August 2019. All of the respondents are from organizations with 250 or more employees, and they must collaborate with at least one person on a daily basis as well as use software and applications to get their work done.

Country



The interviews were conducted using a mixture of online and telephone interviewing, all of which were undertaken using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate. Unless otherwise indicated, the results discussed are based on the total sample.

Sector



About Dropbox

Dropbox is the world's first smart workspace that helps people and teams focus on the work that matters. With more than 500 million registered users across 180 countries, we're on a mission to design a more enlightened way of working. Dropbox is headquartered in San Francisco, CA, and has 12 offices around the world. For more information on our mission and products, visit dropbox.com/enterprise

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