



How Ready Is YOUR Organization for Hybrid Work?

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Navigating This InfoBrief

Click on titles or page numbers below to navigate to each.

- Executive Summary **3**
- About the Hybrid Work Maturity Study **5**
- The Bottom Line: Hybrid Work Requires an Integrated Cross-functional Strategy **6**
- Hybrid Work Maturity Study **7**
- Global Organizations: Maturity Levels of Hybrid Work Initiatives **8**
- What Is Driving Work Transformation?..... **9**
- Organizations Are Redesigning Policies, Culture, Technologies and Facilities to Enable Hybrid Work **10**
- Functions Do Not See Hybrid Work Transformation the Same Way..... **11**
- The People and Culture Dimension of Hybrid Work Needs Greater Support..... **12**

- What Are Hybrid Work Innovators Doing to Create a More Sustainable and Resilient Work Culture? **13**
- Policy Rates Second to Technology as a Critical Component of Hybrid Work Progress **14**
- Organizations Rate Technology as the Most Advanced of the Four Maturity Dimensions..... **15**
- Security Challenges Change as Organizations Become More Mature in Their Hybrid Work Practices ... **16**
- The Facilities Dimension Is Important as the Physical Workplace Evolves to Bridge the Digital Workspace..... **17**
- Hybrid Work Innovators Get Better Business Outcomes Based on Investment in Work Transformation **18**
- IDC Leadership Recommendations **19**
- About the Analyst..... **20**
- Message from the Sponsor..... **21**

Executive Summary

The shifting business, health, and economic conditions of the last few years have forced organizations across all industries to reimagine the ways in which work gets done.

According to IDC's *Hybrid Work Maturity Study* conducted with Cisco, 45% of business and technology leaders say remote and hybrid work models will be an embedded part of accepted work practices moving forward and 93% are planning to maintain or increase spending in this area for 2022.

Across industries, organizations are at varying stages of hybrid work maturity. They are adopting new policies defining digital ways of working – for employees and customers alike. They are experiencing new hybrid work cultures that blur personal and professional boundaries – from wellness to work environments, and across physical places and digital spaces. They are deploying a broad spectrum of technologies to increase employee productivity, business agility, and improve customer, partner and employee engagement.

**45% OF
BUSINESS AND
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say remote and hybrid work models will be an embedded part of accepted work practices moving forward.

**93% are planning
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Executive Summary (Cont.)

The study highlights interdependencies between four dimensions of hybrid work: Policy, people and work culture, technology, and facilities as they evolve across a spectrum of maturity stages as follows:

- ▶ **Hybrid Work Observers** are just beginning to explore different hybrid work models but are largely entrenched in working in traditional in-person ways.
- ▶ **Hybrid Work Adopters** are experimenting with hybrid work models and investing in the technologies to enable them.
- ▶ **Hybrid Work Champions** are seeing success with hybrid work models at the department level but have not deployed them company-wide.
- ▶ **Hybrid Work Innovators** have a declared hybrid policy and the technology to support a hybrid-first approach company-wide that supports more sustainable culture and experience parity for employees no matter their work location.

The study makes clear that hybrid work depends on integrated cross-functional support – a key differentiator as companies navigate across different stages in their adoption of hybrid work models. The goal of exploring hybrid work adoption is to help enable readers to access their level of maturity and identify opportunities for improvement in the short, medium and long term.

About the Hybrid Work Maturity Study

Cisco partnered with IDC to design and conduct custom primary research that could then fuel key insights pertaining to hybrid work initiatives. The study quantifies current maturity rates to inform a variety of valuable comparisons across four maturity stages.

The study included a survey that was comprised of 1,430 global respondents, with representation across 12 countries in Asia Pacific, North America, Latin America and Europe. Companies varied in size (250 employees to 5,000+) across all 20 industry sectors.

In addition, the study explored four distinct roles (HR, IT, Operations, Other Business Leaders) to determine if functional roles had different experiences around hybrid work transformation.

The Bottom Line: Hybrid Work Requires an Integrated Cross-functional Strategy

Hybrid work depends on integrated cross-functional support:

Policy

Needed for codifying “rules of the road” and offering clarity and consistency on who works where, when and how.

People and Work Culture

The lifeblood of any organization’s success in attracting and retaining top talent and driving business.





Facilities

Provides a common environment to foster innovation, community and enable digital collaboration.

Technology

Critical to enabling secure digital and physical work environments that enable access to core resources and co-workers.

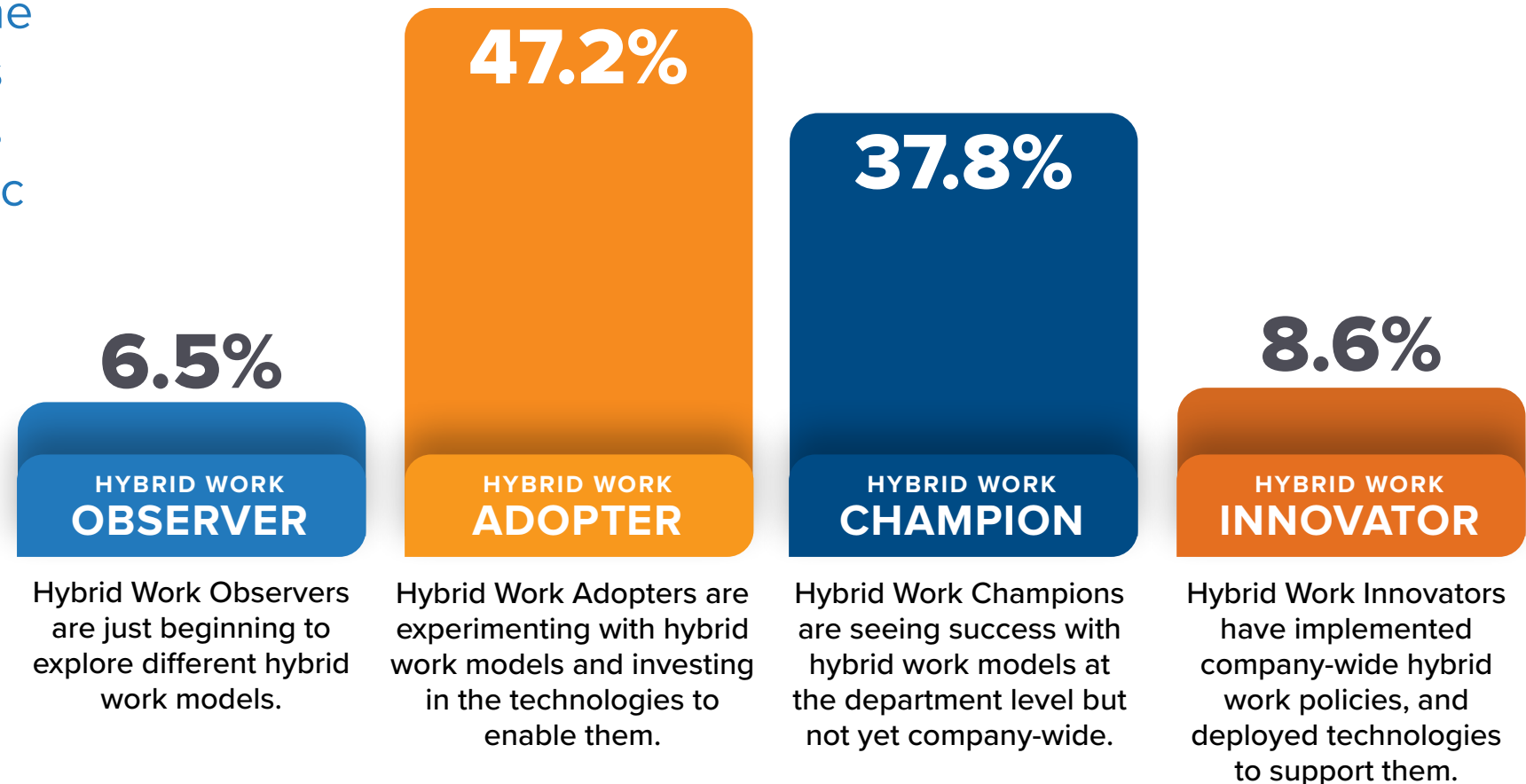
Hybrid Work Maturity Study

Maturity Dimension		HYBRID WORK OBSERVER <i>Just getting started</i>	HYBRID WORK ADOPTER <i>Experimenting with deployment</i>	HYBRID WORK CHAMPION <i>Implemented but not pervasive</i>	HYBRID WORK INNOVATOR <i>Implemented consistently throughout the organization</i>
Policy 	<ul style="list-style-type: none"> Remote work is only allowed for designated teleworkers; there is no hybrid work policy. 	<ul style="list-style-type: none"> Hybrid work is limited to role-specific jobs with minimal flexibility or agency for workers. 	<ul style="list-style-type: none"> Hybrid work is enabled at function or team levels, and includes greater flexibility. 	<ul style="list-style-type: none"> Hybrid work-first is a company-wide policy across all eligible areas. 	
People and Work Culture 	<ul style="list-style-type: none"> Traditional office-centric culture serves to isolate the teleworkers designated for remote work. 	<ul style="list-style-type: none"> Culture is evolving to define engagement between on-site and remote work practices. 	<ul style="list-style-type: none"> Culture is sustained across on-site and remote work environments with only isolated challenges. 	<ul style="list-style-type: none"> Culture is fully sustained and evolving in a hybrid work environment that offers experience parity. 	
Technology 	<ul style="list-style-type: none"> Tools and support to provide secure access to data, applications and other resources are limited. 	<ul style="list-style-type: none"> There is no parity among remote and hybrid workers regarding access to collaboration capabilities and other key resources. 	<ul style="list-style-type: none"> IT tools for secure and seamless access to resources and mobility capabilities are well supported for hybrid work among most functions. 	<ul style="list-style-type: none"> Secure, cloud-first and AI-enabled technologies support hybrid work and provide digital parity company-wide. 	
Facilities 	<ul style="list-style-type: none"> Workplace is designed for optimal space utilization, with little consideration for worker ability to collaborate remotely. 	<ul style="list-style-type: none"> Office transformation is underway to improve collaboration and address needs of remote participants. 	<ul style="list-style-type: none"> Most offices offer secure, intelligent physical and digital collaboration spaces for all key departments. 	<ul style="list-style-type: none"> Offices across the organization offer secure, intelligent physical and digital collaboration spaces supporting environmental, social and governance (ESG) initiatives. 	

Global Organizations: Maturity Levels of Hybrid Work Initiatives

Unlike traditional change management scenarios, the transition to hybrid work is much more challenging as organizations face dynamic business conditions both internally and externally.

Hybrid Work – Global Maturity

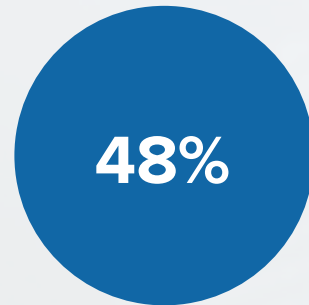


% Respondents

Source: IDC, Hybrid Work Maturity Study, n=1,430

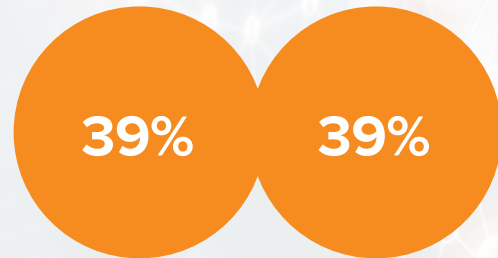
What Is Driving Work Transformation?

RANKED #1



Increased employee productivity

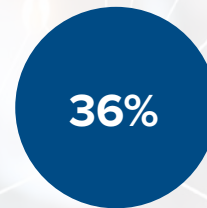
RANKED #2



Business agility/continuity/resilience
Improved engagement with customers and partners

% Respondents

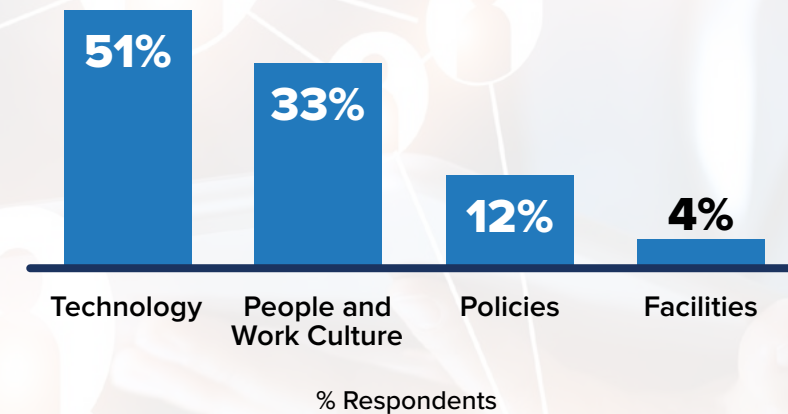
RANKED #3



Improved engagement with employees

In 2022, organizations are most focused on the dimensions of technology, and people and work culture.

Technology is the #1 dimension of focus across all regions and across all company sizes.



Technology investments in hybrid work are critical to its success. However, they must be matched with investments in work transformation policy, culture and facilities. Cultural transformation is an equally important component of whether organizations will evolve or remain challenged in deploying hybrid work initiatives.

Source: IDC, *Hybrid Work Maturity Study*, n=1,430
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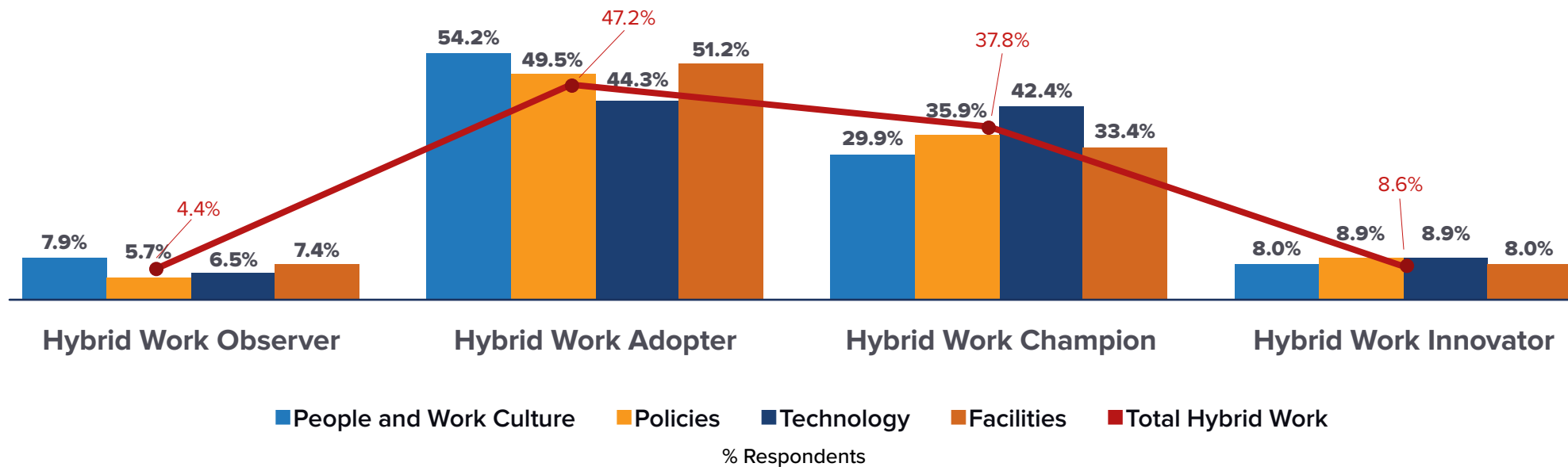
Organizations Are Redesigning Policies, Culture, Technologies and Facilities to Enable Hybrid Work

Many organizations have yet to calibrate all four hybrid work dimensions and reach the highest levels of hybrid work maturity.

Across all dimensions, organizations rate their technology maturity highest.

For Hybrid Work Champions, technology progress is **rated 41% higher** than people and work culture.

Hybrid Work Maturity – By Dimension



Source: IDC, Hybrid Work Maturity Study, n=1,430

Functions Do Not See Hybrid Work Transformation the Same Way

While HR is most conservative about hybrid work progress, IT is the most optimistic about progress.

Why?

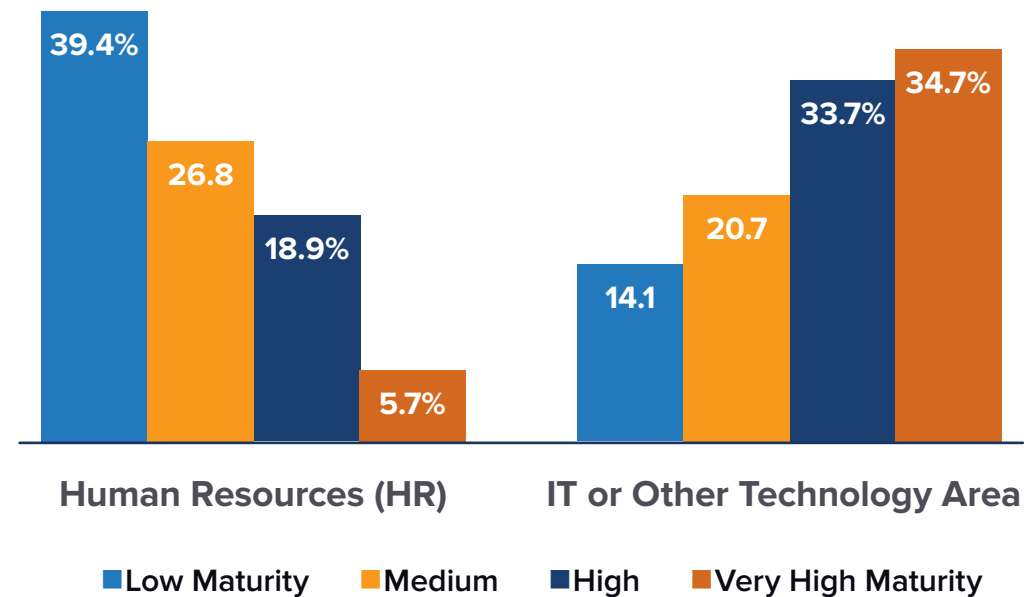
The age-old myth of “build it and they will come” is still prevalent in many organizations.

Leading organizations have found hybrid work demands a more progressive management approach that requires conversations, coordination and planning across functional teams.

Technology is only part of the solution. People and work culture, policy and facilities all need to be integrated as part of a successful hybrid strategy.

Takeaway: Organizations that plan together will have more success.

Comparing Maturity of HR and other Technology



Source: IDC, Hybrid Work Maturity Study, n=1,430



The People and Culture Dimension of Hybrid Work Needs Greater Support

62% of global organizations are at the earliest stages of maturity for people and culture.

Biggest Challenges for Work Culture

- #1 Enabling teams to work effectively together
- #2 Sustaining and evolving work culture
- #3 Trusting employees to complete work efficiently

Hybrid Work Maturity Progress – People and Work Culture

7.9%

HYBRID WORK
OBSERVERS

Organizations considering hybrid work are hesitant to trust employees with data and getting work done in remote work settings.

54.2%

HYBRID WORK
ADOPTERS

29.9%

HYBRID WORK
CHAMPIONS

8%

HYBRID WORK
INNOVATORS

Leading organizations provide a culture of trust and technology that offers seamless, secure and collaborative work experiences.

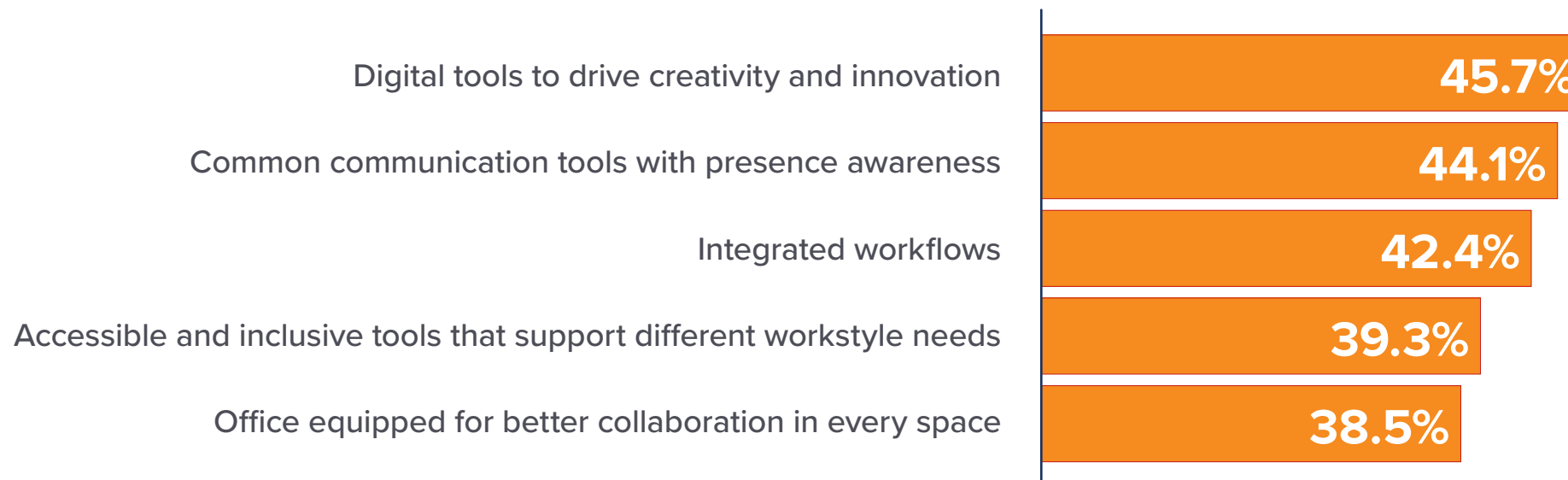
While 8% claim they are Hybrid Work Innovators and can provide a seamless, secure and collaborative work experience that adapts to the needs of employee workstyles, many organizations will be challenged to reach this end state based on the necessary level of empathic and holistic leadership required.

Source: IDC, Hybrid Work Maturity Study, n=1,430



What Are Hybrid Work Innovators Doing to Create a More Sustainable and Resilient Work Culture?

Innovators are using digital tools to drive creativity and innovation, they have integrated workflows, and their offices are equipped for better collaboration in every space.



Hybrid Work Innovators are **1.5X more likely to use digital tools** to drive creativity and innovation than Hybrid Work Observers

Source: IDC, Hybrid Work Maturity Study, n=1,430



Policy Rates Second to Technology as a Critical Component of Hybrid Work Progress

While 45% of organizations are developing a long-term strategy for hybrid work, only 9% have a formal company-wide hybrid work policy.

55% of global organizations are at the earliest stages of maturity for hybrid work policy.



5.7%

HYBRID WORK OBSERVERS

No remote policy.

49.5%

HYBRID WORK ADOPTERS

Limited remote work policy in place.

35.9%

HYBRID WORK CHAMPIONS

Long-term remote work policy developed.

8.9%

HYBRID WORK INNOVATORS

Long-term cross-functional remote work policy deployed.

All Innovators have a remote work policy in place, i.e., a degree 3X to 20X more than the other groups.

Source: IDC, Hybrid Work Maturity Study, n=1,430

Organizations Rate Technology as the Most Advanced of the Four Maturity Dimensions



Hybrid Work Maturity Progress – Technology

4.4%

HYBRID WORK
OBSERVERS

Secure technology access on premise.

44.3%

HYBRID WORK
ADOPTERS

Robust, secure remote setup, not on par with in-office experience.

42.4%

HYBRID WORK
CHAMPIONS

Seamless IT/tools and workforce mobility.

8.9%

HYBRID WORK
INNOVATORS

Cloud-first digital parity leveraging AI and automation.

Hybrid Work Observer Challenges

- ▶ Employees lack the skills and training to efficiently use technology.
- ▶ Lack of IT support for a remote/hybrid workforce.
- ▶ Inconsistent internet connectivity.

Technology hurdles evolve dramatically as organizations develop more mature hybrid work practices.

Security concerns associated with mobile devices or cloud-based solutions are a challenge across all maturity stages.

Hybrid Work Innovator Challenges

- ▶ High acquisition costs for technology.
- ▶ Delivering consistent technology access to remote and on-site employees.

The key technology requirements to progress to Hybrid Work Innovator include secure enterprise-class access to resources from anywhere, and easy access to IT support for use of digital and communication tools.

Source: IDC, Hybrid Work Maturity Study, n=1,430



Security Challenges Change as Organizations Become More Mature in Their Hybrid Work Practices

Hybrid Work Maturity Progress – Technology

Hybrid Work Observer Security Challenges

- ▶ Work devices falling out of compliance.
- ▶ Less confidence in the authenticity of end user login identities.
- ▶ Bring Your Own Devices (BYOD) connecting to corporate resources.

Hybrid Work Innovator Security Challenges

- ▶ The increasing complexity of securing a hybrid enterprise environment (e.g., securing endpoints).
- ▶ Securing the increased scale of remote users, devices, and apps.
- ▶ Sensitive information accessed or saved on unmanaged devices (e.g., personal devices, USB thumb drives).

Less mature organizations focus on more foundational concerns like compliance and trust in employees to complete work. Without holistic investment in both technology and culture they are forced to be reactive to employee churn.

More mature organizations are leveling up security practices to accommodate complex federated work environments that rely on increased automation and sustaining a culture of trust for and through employees.

Source: IDC, *Hybrid Work Maturity Study*, n=1,430



The Facilities Dimension Is Important as the Physical Workplace Evolves to Bridge the Digital Workspace

Hybrid Work Maturity Progress – Facilities

7.4%

HYBRID WORK
OBSERVERS

Office designed for optimal space utilization, not people.

46%

HYBRID WORK
ADOPTERS

Office transformation for collaboration, addresses remote participants.

37%

HYBRID WORK
CHAMPIONS

Office has widespread intelligent spaces and a seamless collaboration platform.

9%

HYBRID WORK
INNOVATORS

Dynamic and inclusive work from office/home/anywhere options without tradeoffs.

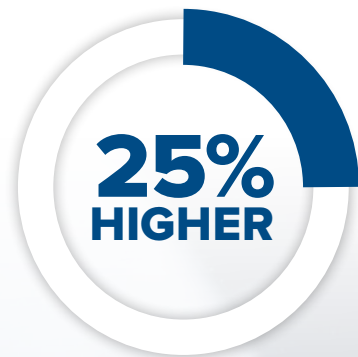
Hybrid Work Innovators have strategic real estate plans that support well-established policies for working across physical locations with a focus on environmental, social and governance (ESG) leadership.

- ▶ Over a third of organizations have a strategic plan for facilities
- ▶ Hybrid Work Innovators have a strategic plan that accounts for ESG
- ▶ Less than 20% are content with traditional office arrangements

Facilities maturity ranks third behind Technology and Policy maturity.

Source: IDC, Hybrid Work Maturity Study, n=1,430

Hybrid Work Innovators Get Better Business Outcomes Based on Investment in Work Transformation



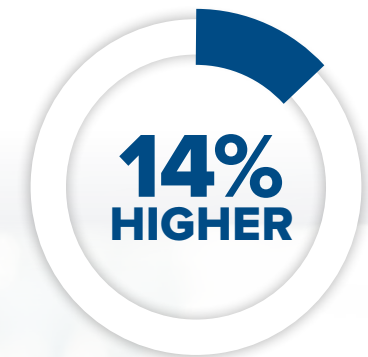
Improvement
attracting
top talent



Improvement in business
agility, continuity
and resilience



Improvement
in regulatory
compliance



Improvement
in employee
productivity

Q: In 2021, what percent improvement did your organization experience in business outcomes as a result of investments in work transformation?

IDC Leadership Recommendations

Enlist cross-functional leaders and transparent communication to deploy holistic hybrid work approaches that integrate technology and facilities with people and policy.



Policy: Align hybrid work policies to your organization's current level of cultural and technical maturity, clearly communicating that they will evolve as the organization and needs of the business adapt to be more resilient.



People and Work Culture: Dedicate efforts toward building a culture of trust such that remote and hybrid employees feel on par with those who are in the office full time. Ensure employees have the tools to engage creatively with each other to drive productive work and innovation.



Technology: Ensure IT can successfully support secure and seamless work environments designed to create a parity of experience between those who are on-site in the office and those who are remote.



Facilities: Reimagine work facilities as places designed for purpose-driven work and hybrid collaboration with a real estate strategy that factors in key ESG considerations.

Develop and evolve a hybrid work strategy across all four dimensions.

Technology must be deployed with end-user requirements in mind, focusing on building culture in and across digital and physical environments. Facilities must be designed to support both on-site and remote workers as well as take ESG concerns into account.

About the Analyst



Amy Loomis, Ph.D.

Research Director, Future of Work

Amy Loomis is Research Director for IDC's worldwide Future of Work market research service. In this role, Amy covers the growing influence of technologies such as artificial intelligence, data analytics, robotics, augmented and virtual reality, and intelligent process automation in changing the nature of work. Her research looks at how these technologies influence workers' skills and behaviors, organizational culture, worker experience, and how the workspace itself is enabling the future enterprise.

[More about Amy Loomis](#)

Message from the Sponsor

Cisco helps you make hybrid work, work better

Understanding how your organization can fully benefit from this growing and fast-evolving era of hybrid work requires a holistic approach. One that includes all of the key stakeholders across IT, Operations and Facilities, and People (HR) and that spans collaboration, security, networking, cloud, and applications. Explore how Cisco hybrid work solutions increase your organization's ability to drive agility, resiliency, and productivity by empowering people to work from home, in the office, or anywhere.

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