

A woman with dark hair, wearing a yellow and white striped shirt, is smiling and looking at a computer monitor. The monitor displays a video conference with several participants. The background is a blurred office setting with bookshelves. The image is overlaid with a white grid and a large white circle on the right side.

2023 Global Employee Experience Trends Report

Contents

03 Introduction

08 The crucial impact of modern EX strategies

16 The importance of supporting hybrid working

35 Cloud-based models and security

44 Investing in mobility

51 The convergence and strategic alignment of EX and CX

68 Conclusion and next steps

75 About the research

81 About us



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Introduction



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Introduction

Welcome to the 2023 Global Employee Experience Trends Report

Our research shows that employee experience (EX) has emerged as the **number-one C-suite priority**, with 94% of CEOs agreeing that **improvements in EX will directly affect their bottom line**.

The **EX narrative has changed**: EX is now about the technologies that **enable and empower users and drive efficiency**, with a focus on **collaboration** and **mobility** tools for **seamless EX**, regardless of employees' location.

And, as automation accelerates, organizations are **prioritizing cloud** as an enabler of dynamic EX and **enhancing security** to achieve their business goals.

NTT DATA's data-driven insights show you what's changing and how you can enable excellence in EX in your organization

Our report spans 25 countries in five regions, and we interviewed 1,442 customer experience (CX) and EX decision-makers and influencers across a range of business roles, from IT, IT security and digital operations to the C-suite. We covered 14 sectors, including retail and wholesale, financial services, healthcare, communications, manufacturing and technology.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Introduction

A new perspective on EX

Our research indicates that many organizations are still adjusting their operating models to balance remote, hybrid and on-premises working after the seismic shifts brought about by the COVID-19 lockdown. New ways of working are now a central consideration in EX strategies across industries.

But, while employees greatly value the flexibility associated with a hybrid or remote role, they are likely to end up frustrated if they lack the tools to do their jobs or if they can no longer take part in training and development initiatives when working remotely.

EX has now emerged as the top C-suite priority, with the spotlight mainly on technologies that enable and empower employees and raise efficiency levels.

Organizational EX goals have therefore evolved well beyond employee wellbeing. The C-suite's objective is now to boost productivity by engaging and enabling all employees with collaboration and mobility tools, whether they're at the office or working from a remote location.



Introduction

Four pillars now underpin modern EX strategies



The importance of supporting hybrid working

Nearly 60% of employees around the world are following a hybrid work model or working remotely full time, but many lack the technology they need to perform optimally.

- 57% of employees are following a hybrid work model (27%) or fully remote (30%), which has led to increased investment in mobility and, at the office, video-capable spaces.
- Only 48% of organizations agree strongly that employees have access to technology that will enable and augment their performance while they're working from home or remotely.



Cloud-based models and security

Collaboration and communication tools are now mostly cloud-based, so any EX strategy must form part of an organization's overall cloud strategy. Cybersecurity is paramount to protect sensitive employee and corporate data.

- Cloud technology has been voted as the top enabler to fuel improved employee performance, which directly enhances bottom-line business results.
- 95% of organizations say cloud solutions are vital for enabling outcomes related to EX.
- Organizations list security concerns about customer data held in the cloud as the biggest challenge to their successful migration to the cloud.



Investing in mobility

Modern EX includes the broader enablement of employees – for example, how office spaces are changing to accommodate hybrid workers, or how mobile devices can be deployed to facilitate remote working.

- 73% of organizations say hybrid or remote working has led to their investing in mobility in the past two years; 75% will continue investing in this area in the next two years.
- Most organizations have invested in mobile device management (security and support), business-grade internet connections and application or software development.



The convergence and strategic alignment of EX and CX

Organizations have made the connection and are seeing how great EX can support improved CX and therefore business growth – but only when there is strategic alignment between CX, EX and broader business and technology strategies.

- Satisfied and engaged employees are 66% more likely to deliver exceptional customer service.
- 96% of organizations agree that CX and EX strategies must be closely aligned to maximize their impact on business growth.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Introduction

Enablement and empowerment

EX is not about raising productivity by increasing employees' work hours; rather, it's about making things easier for employees so they have more time to focus on what truly matters in their jobs and improve how much they produce in the time they have available.

Employee enablement and empowerment have therefore emerged as the central tenets of EX:

- "Enablement" refers to organizations using new technologies to allow employees to operate from anywhere. This in turn drives productivity, customer service and financial outcomes while helping employees maintain a healthier work-life balance.
- Employees also need to feel valued and connected to their colleagues, their managers and the wider organization – and empowered in their roles. CEOs have to communicate with their employees in a way that helps them understand the objectives of the business and makes them feel like they are part of a team.

Technology plays a central role in realizing productivity and efficiency gains through great EX. Whether employees are in the office or working remotely, they can use technology to decide how and when they want to collaborate.

Newer, more intuitive communication and collaboration tools – which are now mostly cloud-based – lead to increased productivity and user satisfaction.

Microsoft Teams, for example, achieves these goals by providing a consistent user experience across various platforms: mobile, laptop, desktop and meeting rooms.

The new EX narrative and focus means organizations will need to embrace new technologies to evolve their EX. We hope you find our analysis and insights useful as you contemplate the future of EX in your own organization.

Amit Dhingra
Executive Vice President: Managed Network and Collaboration Services at NTT Ltd.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The crucial impact of modern EX strategies



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



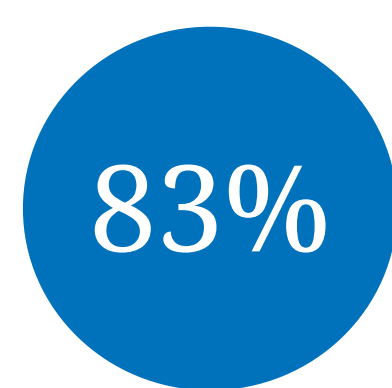
The crucial impact of modern EX strategies

Even as organizations recognize how excellence in EX can improve productivity, talent retention and business outcomes, most report low performance in this area.

Our research shows there is also a widening gap between how executives and operational teams perceive EX standards in their organization. CEOs may be aware of their organizations' EX-related challenges, but executives still report higher levels of satisfaction with their EX capabilities than operational leads.



of CEOs strongly agree their organization is recognized as an employer of choice.

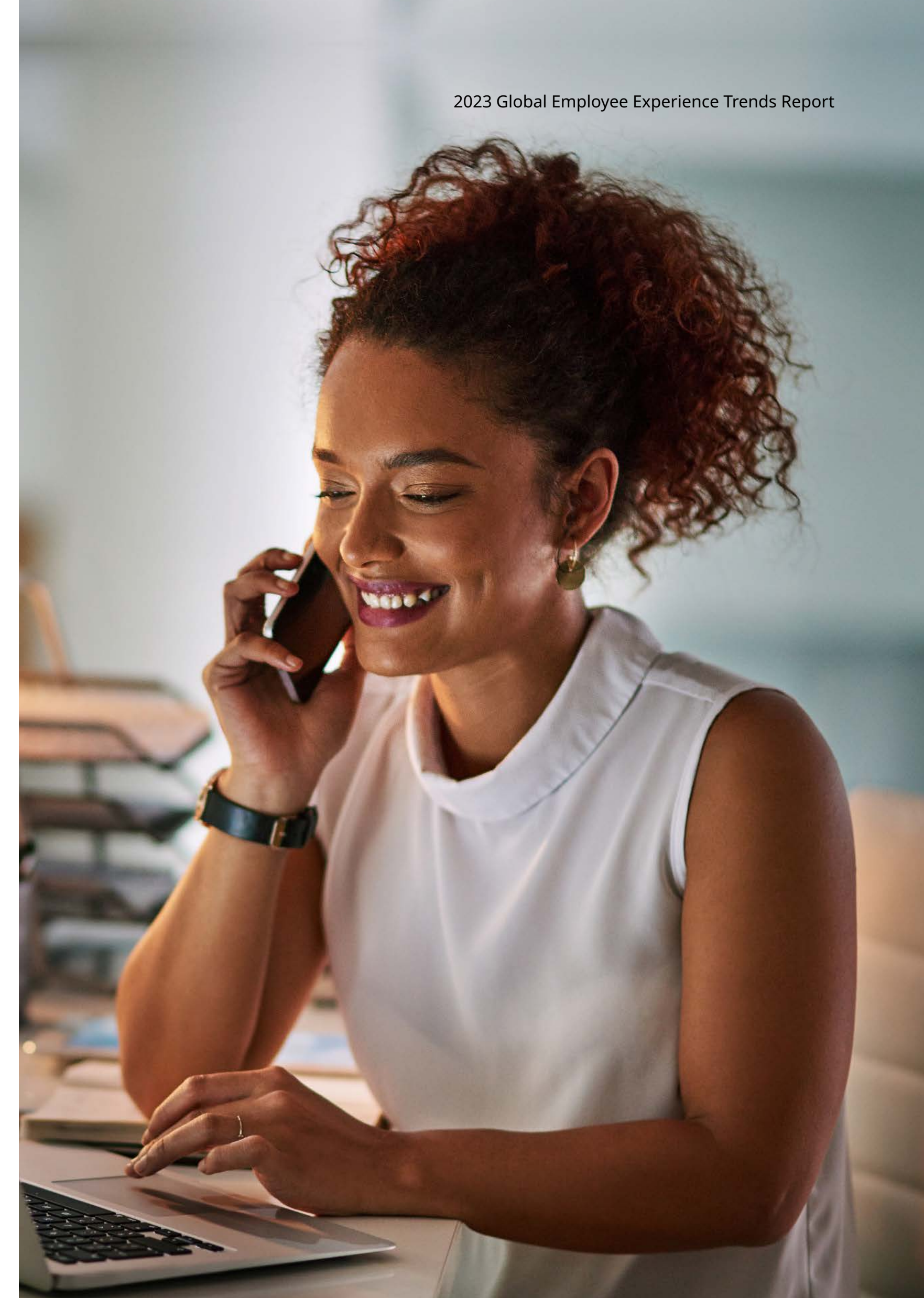


of organizations say their levels of EX capability are low and that this negatively affects delivery and business success.



of operational leads say they are very satisfied with their organization's EX capabilities, yet executives are almost twice as likely to be very satisfied.

Even so, there is enough of a newfound appreciation of the value of EX to give it strategic impetus and place it at the top of the C-suite agenda – motivated by the need to improve productivity, employee satisfaction and, ultimately, the bottom line.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



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Seismic global changes like the COVID-19 lockdown, economic inflation, hybrid working and skills shortages have upset the employer–employee balance, and EX has really come to the fore in this context. Today’s employers have to compete for critical talent to underpin their growth strategy, especially their journey to digital transformation. So, how do you keep your A-grade talent and attract new talent through the promise of EX?

— Marilyn Chaplin
Chief Human Resources Officer at NTT Ltd.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Top 5 factors motivating EX investment



Improved productivity



Greater employee satisfaction



Business agility, flexibility and speed



Higher employee retention



Improved automation

#1

C-suite says improving EX is their top business priority.

94%

of CEOs say improvements to EX directly impact their net profit.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





The journey to world-class EX increasingly includes the application of technology as part of a broader business strategy. Most organizations agree strongly that they're increasing their investments in digital technology – including cloud and cybersecurity – to counter current economic pressures.

And, amid the rise of AI-enabled tools in the past year, [AI is voted to be the number-one technology enabler of EX strategies in three years' time.](#)

An EX strategy must address all aspects of the employee's experience. It can't be just about employee satisfaction and wellbeing, EX technologies or the effect of good EX on CX, but should be driven by all three aspects.

To support a holistic EX strategy, organizations need to have the right policies in place and deploy the most appropriate toolsets. Employees have to be supported with change management, upskilling and training to support how they work and collaborate, no matter their location.

Also, the earlier these actions are taken, the better – otherwise it becomes much harder to realize the benefits.

“ Employees have become pretty clear on what they value in terms of EX. At the top of their list of priorities is a need for more flexibility and time. They use this as a basis to decide whether to stay with an employer, and new initiatives like the four-day workweek can attract a lot of talent. But even just hybrid working with less commuting creates that flexibility.

— **Charlie Doubek**

Vice President: Managed Collaboration and Communications at NTT Ltd.



Introduction

The crucial impact of
modern EX strategies

The importance
of supporting
hybrid working

Cloud-based
models and
security

Investing
in mobility

The convergence and
strategic alignment
of EX and CX

Conclusion
and next steps

About the
research

About us



The crucial impact of modern EX strategies

Aligning with technology and business strategies

Organizations' EX strategies should align with more than just their CX strategies. To be effective, they also need to consider their broader business and technology strategies.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

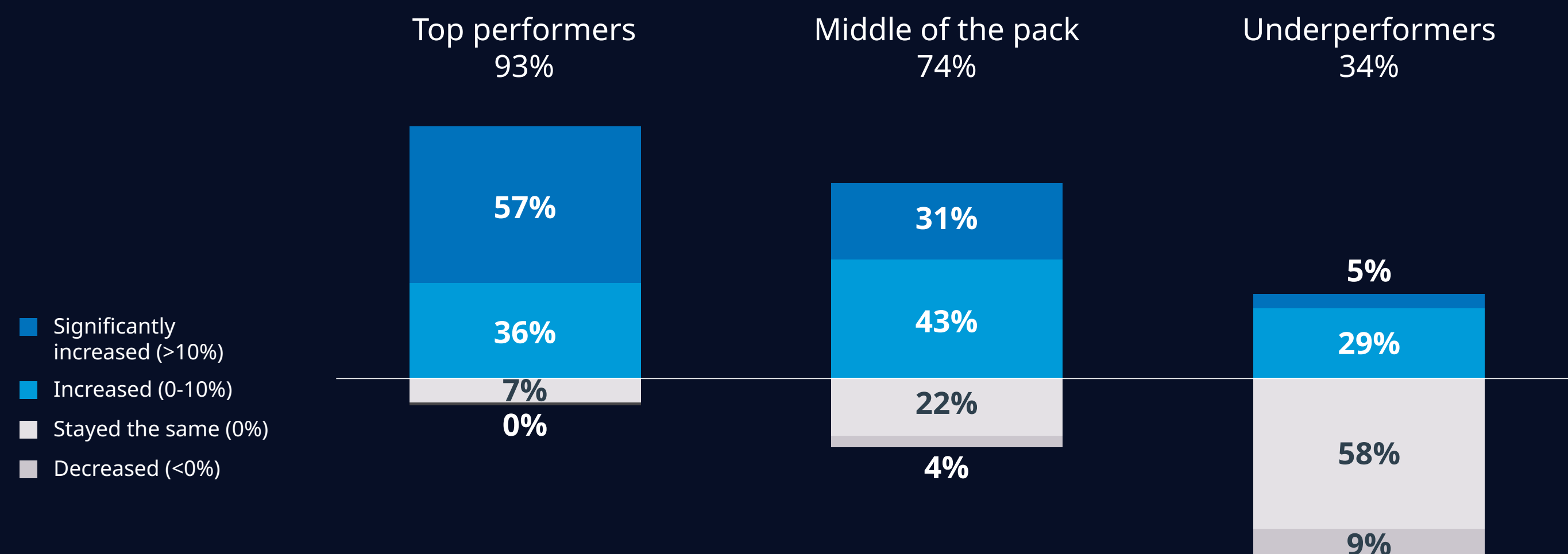
About the research

About us



So, improving EX also means improving IT, and our research shows a direct correlation between IT spending (as a percentage of revenue) and EX performance. This is why top-performing organizations are investing in technology to enable their employees. In fact, they are over 20 times more likely than underperforming organizations to have recorded a significant increase in EX results in the most recent fiscal year.

IT spend as a % of revenue



“**Top performers** are 89% more likely to have experienced a **significant increase in EX** results in the past fiscal year than those in the middle of the pack, and over 20 times more likely than **underperformers**.”

Please rate your organization's performance in the following areas in the past fiscal year (select one for each)
 Base: All respondents, excluding "Don't know" responses (n=1,422 to 1,435)



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The crucial impact of modern EX strategies

What are top-performing organizations doing?

Many organizations are turning to technology to digitalize, innovate and enable. But top performers are nearly twice as likely as all other organizations to be in a state of advanced digitalization – and 89% more likely than all other organizations to have significantly increased their levels of employee satisfaction.

Our research shows these top performers are ahead of the curve both in executing their EX strategies and in how they are planning for the future.

Top-performing organizations are those with year-on-year revenue growth of more than 10% and an operating profit margin of more than 15% in the last financial year. See page 79 for a full definition.

Top performers are

10x
more likely than underperformers to have **significantly increased their IT spend in the past fiscal year.**

Top performers are

89%
more likely than all others to have **significantly increased employee satisfaction in the past fiscal year.**

Top performers are

74%
more likely than all others to be in an **advanced state of digitalization.** Data shows that improved digital advancement leads to an exponential increase in employee satisfaction (ESAT).

Top performers are

56%
more likely than underperformers to report improved **business growth** due to improvements to EX.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The importance of supporting hybrid working



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The importance of supporting hybrid working

Remote working had already been expanding before it boomed during the pandemic. Now – despite lockdown-era predictions to the contrary – about **6 in 10 employees** are still working remotely all or some of the time, and remote working has become a key part of employee retention and engagement strategies.

An inclusive EX strategy should connect remote, hybrid and office-based employees to increase employee wellbeing and talent retention across the board.

Over half

of employees work fully remotely or as part of a hybrid model.

Only 48%

of organizations strongly agree that their employees have access to the technology they need when working from home or on-premises.

#1

CEOs vote hybrid/remote work flexibility as the #1 driver underpinning successful EX strategies.

AI

AI, machine learning and bots are ranked as the #1 enabler that will reshape EX capabilities in the next three years.



After the COVID-19 lockdowns around the globe were lifted, there was a clear preference in the workforce for the flexibility that hybrid or remote working allowed – despite an expectation that most workers would return to the office. Now, **about 1 in 5 employees would prefer to work remotely all the time and only about 1 in 10 want to go back to the office full time.**

Some organizations have allowed hybrid and remote working to continue and reduced their physical office space to cut costs. They are also expected to provide digital tools to enable efficient collaboration between office-based and remote workers – all while fostering a new culture of employee engagement.

The reality is that both hybrid and fully remote work are prevalent and here to stay.





How many are working from the office?

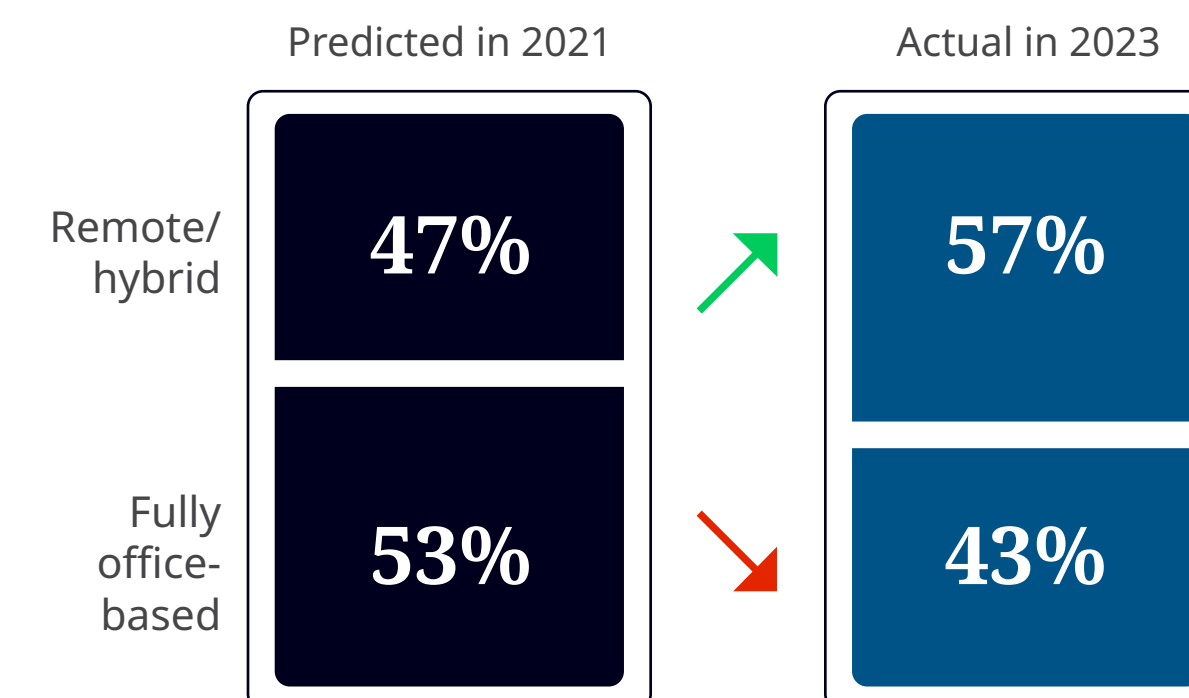


Currently, **70% of employees work from an office location**, either full-time (43%) or as part of a hybrid model (27%), while **30% are fully remote**.



On average, the majority (**56%**) of **hybrid workers** will spend **half the work week** at the office. Ideally, 63% of employees prefer to spend at least half the work week working from home.

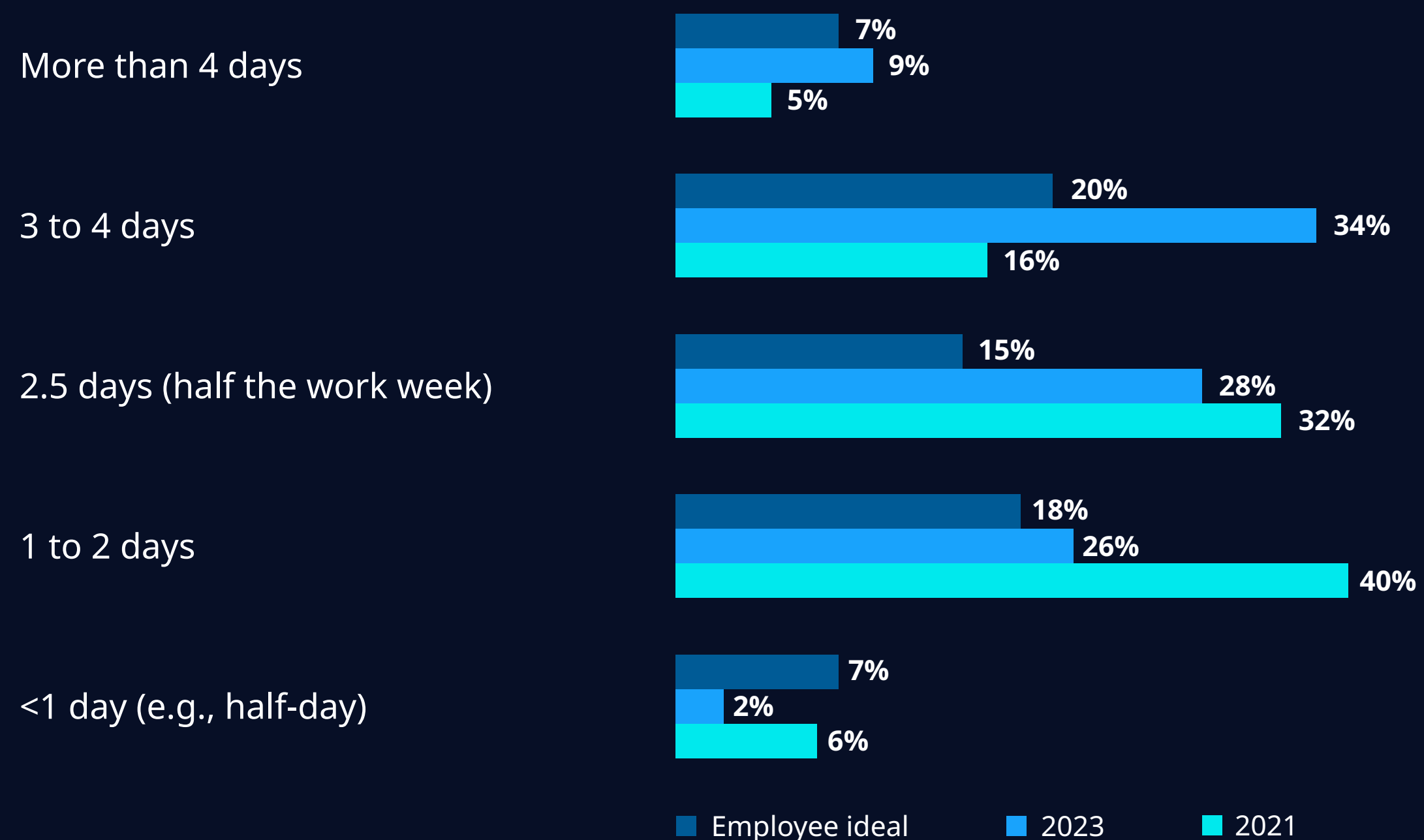
Employers expected many people to return to the workplace after the pandemic ... but it seems **hybrid and remote working are here to stay**.



Where do employees want to work?

On average, the majority (56%) of hybrid workers will spend half the work week at the office; 63% of employees would prefer to spend at least half the work week working from home.

Among hybrid employees: number of days per week spent working remotely



“21% of employees would prefer to work fully remotely and only 12% prefer to be fully office-based.”

Employees still value their connections to the office, both as a physical place – where they can use certain technologies to communicate and collaborate with their colleagues – and as an emotional space where they feel part of a team and can access opportunities for training and career development.

To address this, organizations are rethinking their physical workspaces while investing in mobility-related technology and video capabilities.



The problem

Only

48%



of organizations agree strongly that their employees have access to the technology then need when working from an office or from home.

86%



say their organization has yet to optimize a hybrid/remote working model, and this has led to a deterioration of employee wellbeing.



Technology enablement (correct and efficient collaboration tools) is the #1 organizational priority for enabling EX strategies in the coming 12 months.

The response

92%



are planning to invest in physical workspaces and offices in the next two years.

96%



are investing in mobile device management security and support as hybrid working accelerates the need for application and device management tools for devices.

72%



plan to equip at least 50% of their meeting rooms with video capability and integrated unified communications.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



“ Hybrid working enables organizations to look for talent in locations other than where the job would typically be done. A manager at our business process outsourcing head office in Toronto can now easily coach and support an employee in Cape Town or Manila. In fact, they can monitor real-time customer conversations and instantly chat with their team members to proactively assist with challenging situations or knowledge support. Likewise, the employees can be confident in knowing that, even when they work from home, we have their backs and will support them when they need us. But having an office hub where people can congregate is also important. They need to feel part of something.

— **Christine Barr**

CEO: Business Process Outsourcing (BPO) at NTT Ltd.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The importance of supporting hybrid working

Supporting hybrid working with technology

The scope of EX technology has expanded beyond just communication tools to include the full workplace experience, whether employees work from home or the office.

It's not surprising, therefore, that technology enablement has emerged as the foremost priority for enabling EX strategies in the next 12 months. The focus is on mobile device management and support, followed by the rethinking of corporate workspaces and ramped-up video capabilities, among other priorities.

Look ahead three years, however, and AI and machine learning rise to the top of the list of EX enablers.

More organizations are starting to use these solutions to improve EX for office workers, but **those that are thinking ahead** are already expanding the vision to **include field workers** and other employees whose jobs take them out of the office environment.

Emerging EX solutions will also increasingly enable organizations to measure and report on EX, with much of this automated via AI. They'll be able to optimize EX by learning from employees' interactions with each other – how they interact, or how long it takes them to find answers to their questions – and improve their workspace management as needed.

These insights can also lead to operational efficiencies that give organizations a competitive edge while supporting compliance with, for example, data privacy regulations. In fact, nearly all organizations (95%) now agree that quality-monitoring and analytics tools, with a focus on compliance, are a high priority and integral to workforce-optimization tools.

Trending technology enablers to improve EX capabilities

In the next 12 months

1. **Mobile and remote working tools and networks** (MDM, devices, headsets, etc.)
2. **Hybrid workplace/office redesign** (meeting rooms, etc.)
3. **Evolving technology architecture** (cloud computing, network modernization, etc.)
4. **Cybersecurity tools**

In the next three years

1. **AI, machine learning, bots**
2. **Evolving technology architecture** (cloud computing, network modernization, etc.)
3. **Mobile and remote working tools and networks** (MDM, devices and headsets, etc.)
4. **IoT, sensors or wearable technology**



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The importance of supporting hybrid working

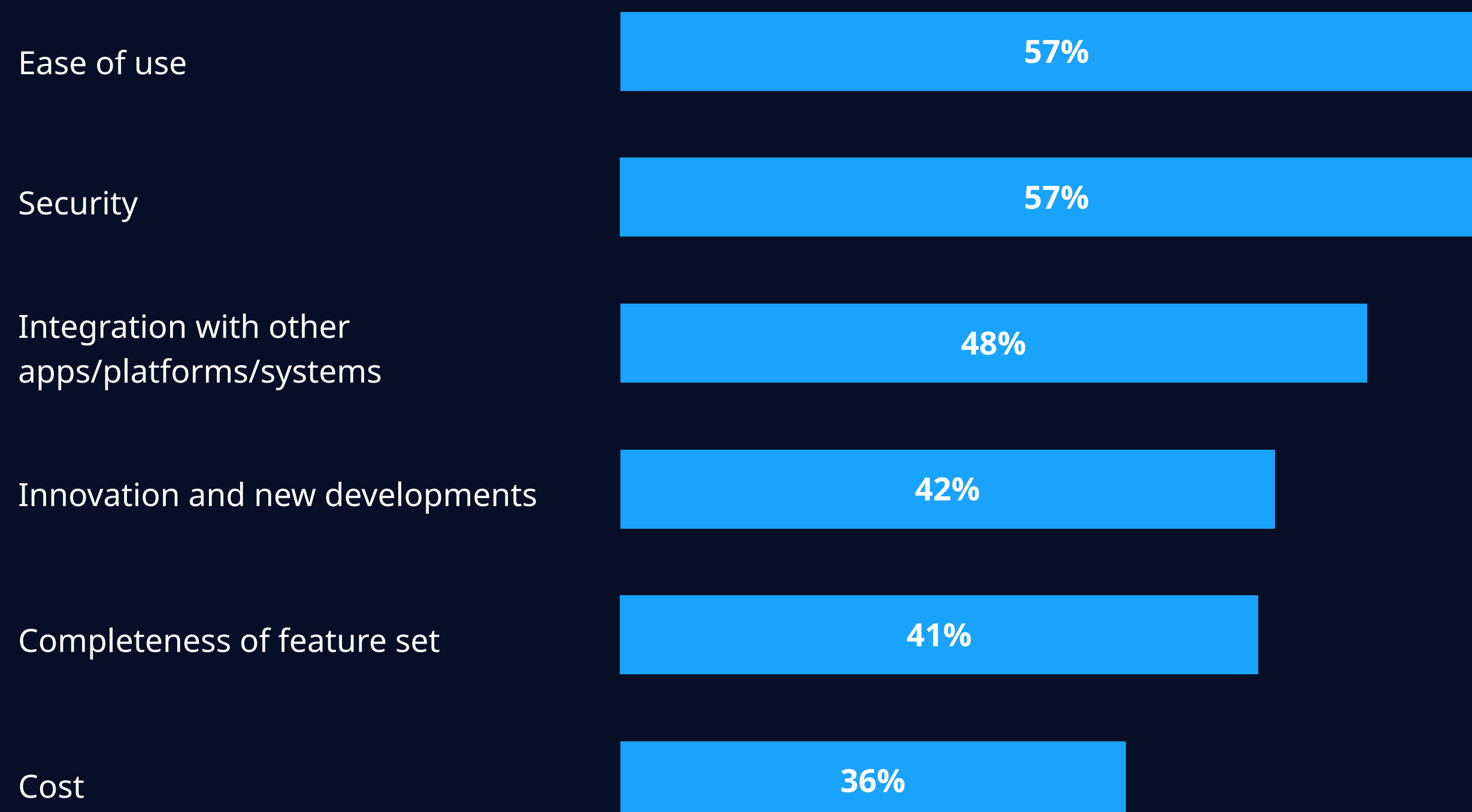
Skills must keep pace with the technology

Another way to support hybrid working is to adopt collaboration platforms such as Microsoft Teams or Cisco Webex.

These tools improve employee communications through instant messaging and videoconferencing, and support teamwork by enabling employees – including those who are working remotely – to collaborate on projects and share documents in real time.

“83% of organizations are providing remote and hybrid workers with collaboration tools and platforms (such as Microsoft 365, Cisco Webex, Slack etc.)”

Reason(s) for preferring a communication and collaboration platform



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





A collaboration platform that's aligned with an organization's operational needs and is secure and easy to use (among other requirements) can maintain or even increase productivity, no matter where employees are located.

It won't help much if an organization invests in a collaboration tool that ends up operating in a silo and requires a lot of training before people can use it.

The need for ongoing upskilling of employees does not disappear, though, and the way to accomplish this can vary significantly, depending on an organization's specific circumstances.

Possible approaches include change management efforts whenever new EX technologies are introduced, with dedicated teams to champion these initiatives.

For organizations that work with a managed service provider to improve their EX, change management should be included as a service – both when new EX technologies are launched

and throughout the incubation of these projects. A lack of follow-through in this regard will lead to diminished returns on EX initiatives.

Alternatively, organizations might invest in a learning portal that offers on-demand access to a range of courses so that employees can tailor their learning experiences to their individual needs and learn at their own pace.

Keeping these EX tools integrated plays a pivotal role in how useful they are to employees. A seamless user interface, good user experience and intuitive design are paramount across work settings – meeting rooms, factory floors, a home office or even an unconventional location such as a forest trail.

Organizations should also consider factors beyond the software installed on employees' devices. A fast and stable underlying network infrastructure, for instance, is crucial.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The importance of supporting hybrid working

Designing the workplace of the future

Spotlight on evolving workspaces

To bridge the gap between office and remote workers, organizations are reshaping their workspaces.



88% say improvements to the **physical office environment** have an impact on their **bottom line**.



Over two-thirds say that **hybrid workplace/office redesign** will be key to **reshaping and improving EX capabilities** over the next three years.



Organizations have to adapt their facilities to bridge the gap between remote work and office-based work. This can have a significant impact on the bottom line by improving employee productivity, engagement and wellbeing. While a well-designed office enhances employee focus and efficiency, it also fosters a sense of pride and belonging among workers, making them feel more engaged – which is particularly valuable for hybrid workers.

The long-term benefits of rethinking office space in the era of hybrid working can include energy savings and reduced maintenance costs, ultimately leading to cost savings.

However, **only 43% of organizations agree strongly that their office space fully supports hybrid working** – that is, they have consolidated their office spaces and invested in technology to upgrade their office environment (for example, by providing robust connectivity).



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

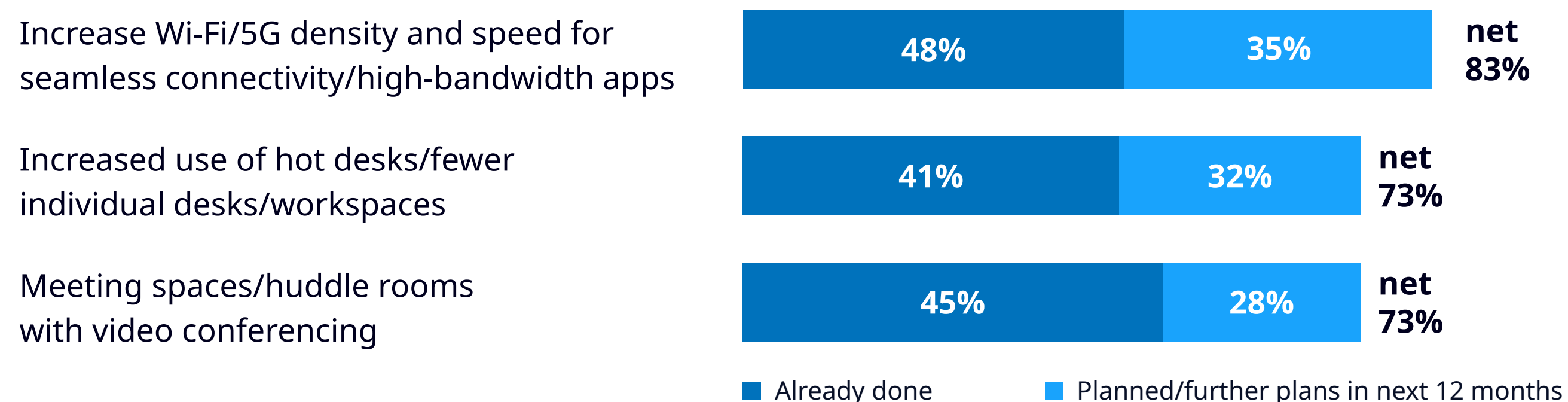
Conclusion and next steps

About the research

About us



Changes made to/planned for physical office workspaces



Organizations are consolidating or repurposing workspaces to cater for specific needs and situations. They are rethinking the configuration of meeting rooms as hybrid workers now travel to the office specifically for meetings, workshops and other team events.

The goal is to align the room setup with its intended purpose, making it conducive to productive interactions and meaningful collaboration – for example, by ensuring internal and external participants alike can access meeting rooms seamlessly and that the setup supports crystal-clear video and audio for remote attendees.

To accommodate the needs of a more flexible and mobile workforce and create a more collaborative work environment, **73% of organizations are increasing their use of hot desks** and reducing the number of individual workspaces.

And 48% say they have already increased their Wi-Fi/5G density and speed to support seamless connectivity and high-bandwidth apps, while 35% plan to do so or continue their efforts in the next year – meaning 83% of respondents are attending to this need.



You’ve got to approach hybrid working with purposeful intent. Just having a policy won’t work. In fact, we don’t have a policy at NTT DATA so much as we have a philosophy that for 80% of roles, we think connected working can work if it’s done purposefully and intentionally. And that means we still need workspaces. We will never be a fully remote-working company. We want to have workspaces where people can connect.

— Marilyn Chaplin
Chief Human Resources Officer at NTT Ltd.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The importance of supporting hybrid working

The rise of video enablement

Creating a human experience with video capability

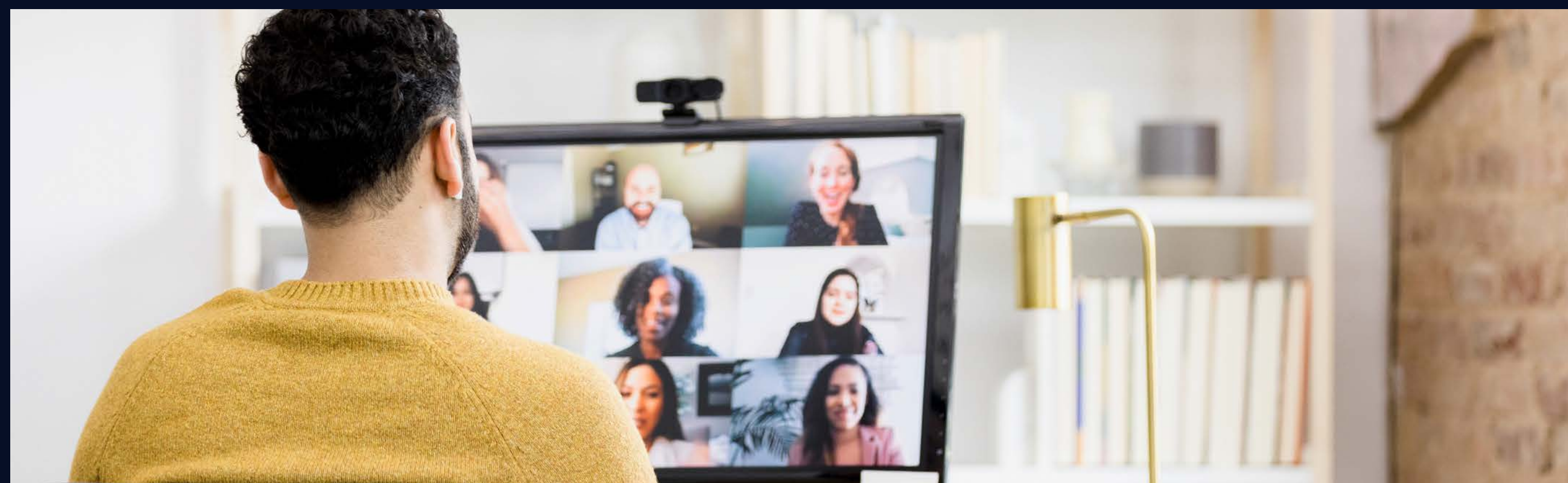
Video connectivity can increase EX satisfaction, and this is driving organizations to invest in video solutions.



Those already using video chat operationally are over **80% more likely to be very satisfied with EX** than those with no immediate plans to deploy.



Nearly **three-quarters** of organizations are planning to make **at least 50%** of their meeting rooms **video-capable and integrated with unified communications** over the next two years.



The effective use of video is taking center stage, especially as organizations navigate the hybrid work environment:

- More than 7 in 10 organizations are now upgrading their meeting spaces with videoconferencing, many at an advanced level, and are planning to raise the proportion of video-capable rooms from 48% now to 65% in the next two years.
- While 21% of organizations report that more than three-quarters of their meeting rooms are currently video-capable and integrated with unified communications systems, 44% plan to reach this level in the next 12 months.

IT and HR policies should inform the organization's video strategy. Such policies may relate to content-sharing practices and secure external access, for example, or the training of employees on what is permissible to share in meetings with external parties.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





Why employees need to see each other:

“

According to psychology professor and author Albert Mehrabian, communication comprises 55% nonverbal cues, 38% vocal tone and only 7% spoken words. So, the deployment and optimal management of video matter. When people see and interact with each other, conversations become more meaningful and creativity thrives.

Above all, data security and employee privacy (including complying with regional or country data regulations) remain paramount. Video tools should be used in a way that nurtures employee trust. They should not be a means of control (such as a way of monitoring employees) but rather a means of empowerment for remote and hybrid working.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Enhanced EX through unified video interfaces



Video enablement means employees are no longer hindered by technology or user interfaces when deciding whether to remain at their office workstation, equipped with a laptop and camera, or to move to a meeting room where they intend to convene with colleagues who are working remotely.

These advances in technology also make those who are working from home feel more engaged when they attend meetings remotely. This, in turn, motivates employees to use video capabilities more frequently – and more people will also activate their video streams during meetings.

Organizations might also issue high-quality supporting devices to employees, such as speakers and headsets with noise-cancellation features.

Consequently, engagements with people who are participating remotely in a meeting are improving in quality, as the technology enables all meeting participants to interact effectively and have a similar experience. In this way, organizations are creating an inclusive and simplified user experience.

Of course, these advances depend on how fast they can upgrade their existing meeting spaces with at least basic video capabilities.

And the technology itself is also still evolving – to place more focus on eye contact and engaging with a speaker, for example, or to make sharing or displaying a document in a virtual meeting room as seamless as possible.

Most organizations are tackling this improvement systematically by first implementing simple and cost-effective foundations before gradually increasing the level of sophistication.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

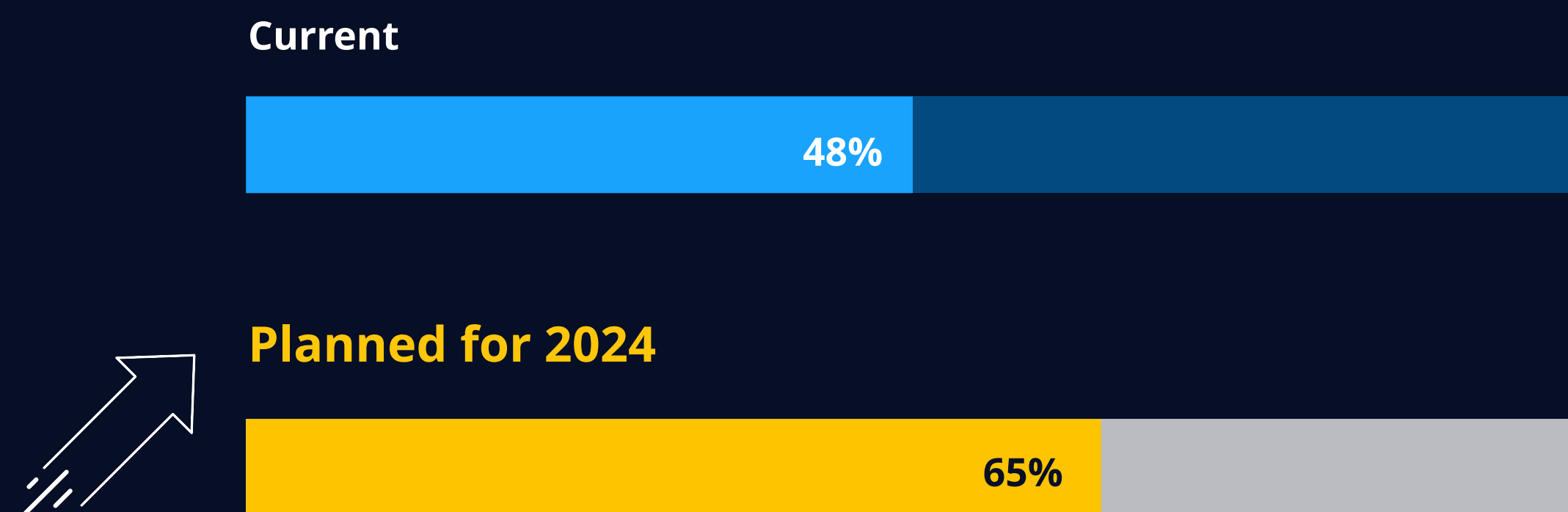
About the research

About us





Mean % of meeting rooms that are video-capable and integrated with unified communications



Level of sophistication of video-capable meeting rooms (average % of each type of room) in the next 12 months



What percentage of your organization's meeting rooms are video-capable and integrated with unified communications? (Select one for each) Base: All GROUP 4 – IT respondents, excluding “Don't know” responses (n=416/415)

What percentage of meeting rooms that are video-enabled now, or will be video-enabled within the next 12 months, can be described as... (Enter number from 0-100 for each) Base: IT respondents with video-capable meeting rooms, excluding “Don't know” responses (n=299 to 311)



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The importance of supporting hybrid working

Manage rooms, not just devices

Another trend is the shift in focus from managing devices to managing meeting rooms. In the past, managed service providers or in-house IT teams focused on device management only, including certified Cisco or Microsoft devices installed in meeting rooms.

Now, however, **augmented reality (AR) ecosystems and analytics** have come into play as organizations focus on making quality collaboration and communication services available to all their employees, no matter their location.

In different organizations, certain rooms will also be more important than others. An organization might have a number of VIP meeting rooms fully supported by a service provider while other rooms require more basic device management.

So, the scope has broadened beyond simply enabling meetings. Now, the organization needs to know that meeting rooms are always easily accessible to all staff – locally or remotely – and that any technical issues can be resolved with minimal intervention.

It's no longer enough just to initiate a meeting and then leave the attendees to get the video and audio devices in the room up and running. Instead, a facility control system should determine automatically if a room is available, check that it's configured correctly and even make a test call.

It should also track room usage in detail. For instance, are rooms being used solely for individual video calls or are they serving as meeting spaces where participants interact on camera? How much content sharing is happening? Are eight people squeezed into a room meant for four?

All of this data will help to identify opportunities to improve the operation of meeting rooms and the application of video technology to increase employee satisfaction.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



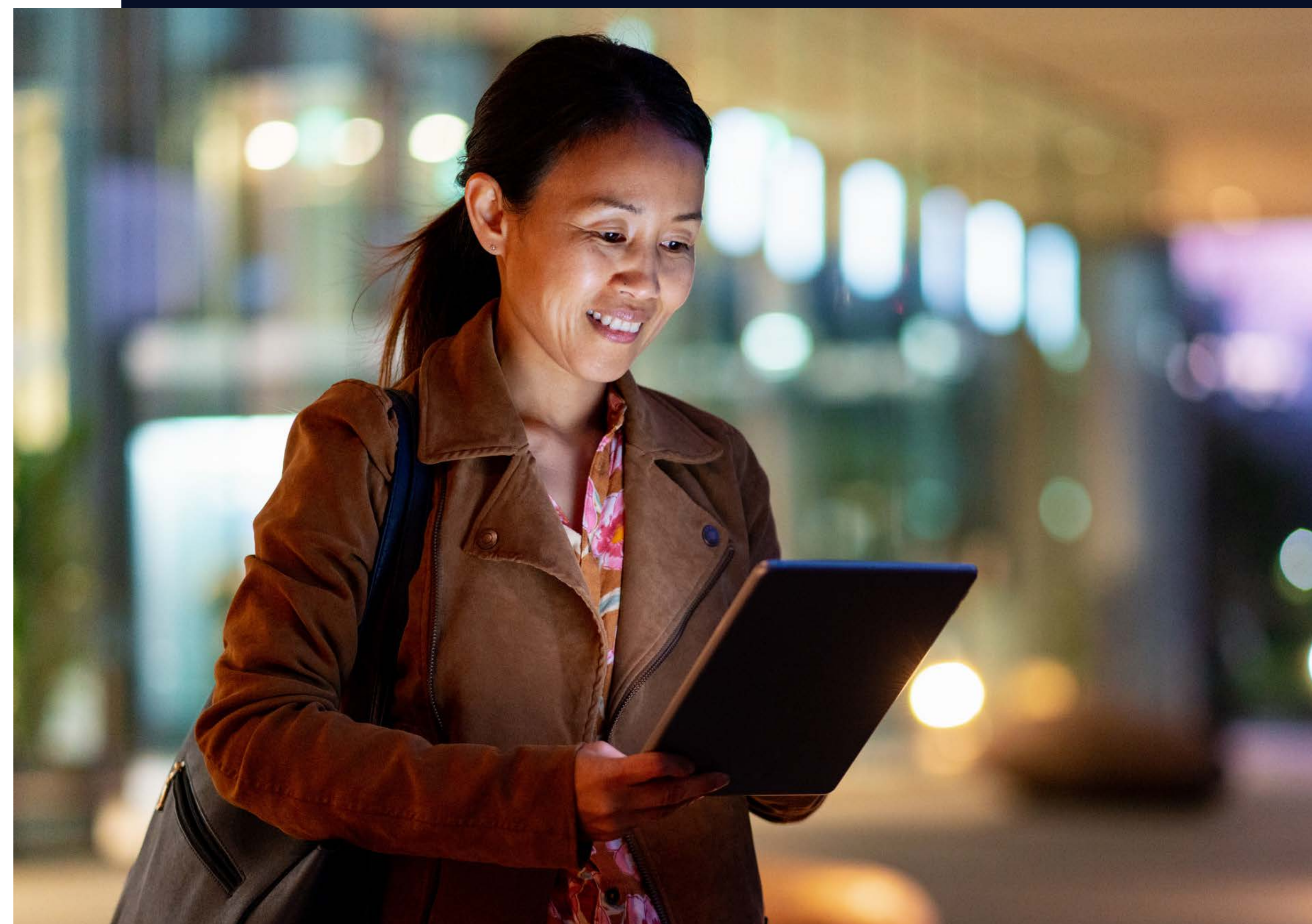
AI and avatars: what's next in video?

Some visions of the future of videoconferencing include holographic avatars interacting with each other in physical meeting rooms – but holograms rely on expensive and specialized technology, making this a challenging and distant concept.

The use of augmented reality is a more realistic line of development, especially as AI is increasingly being integrated into EX tools – for example, to interpret the facial expressions of attendees and update the expressions of their avatars accordingly, should they be using them.

On a more practical level, there are other benefits related to the fusion of video and AI. Managing the quality of video streams can extend beyond just the picture quality to automatically consider the underlying network, the sound-capturing and reproduction systems, and even the layout of a meeting room.

AI can also automate certain actions such as making room reservations, initiating meetings once participants have entered the room, or managing environmental conditions – for instance, using data from carbon-dioxide sensors to automatically adjust the air-conditioning based on the room's occupancy levels.



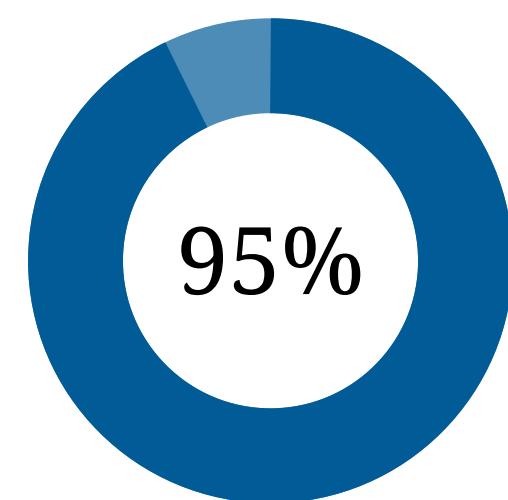
The importance of supporting hybrid working

Modern EX strategies can also support sustainability goals

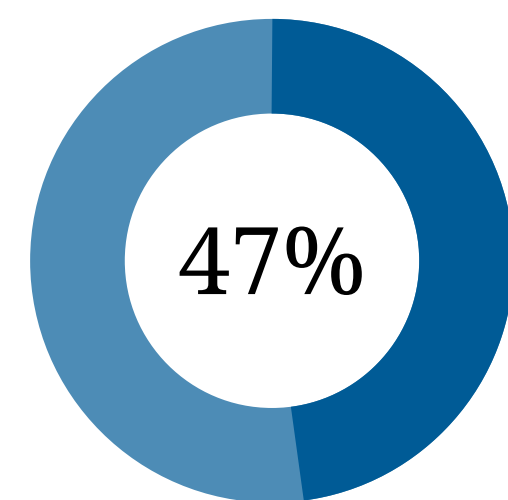
Sustainability and the workplace

Enterprises are integrating sustainability with EX strategies to align with evolving customer and employee expectations. 94% now require new vendors to have a prescribed level of sustainability credentials.

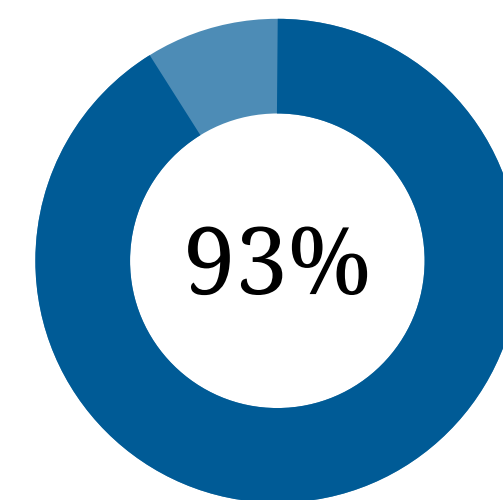
Top performers rank sustainability and environmental, social and governance (ESG) factors as their #1 business priority.



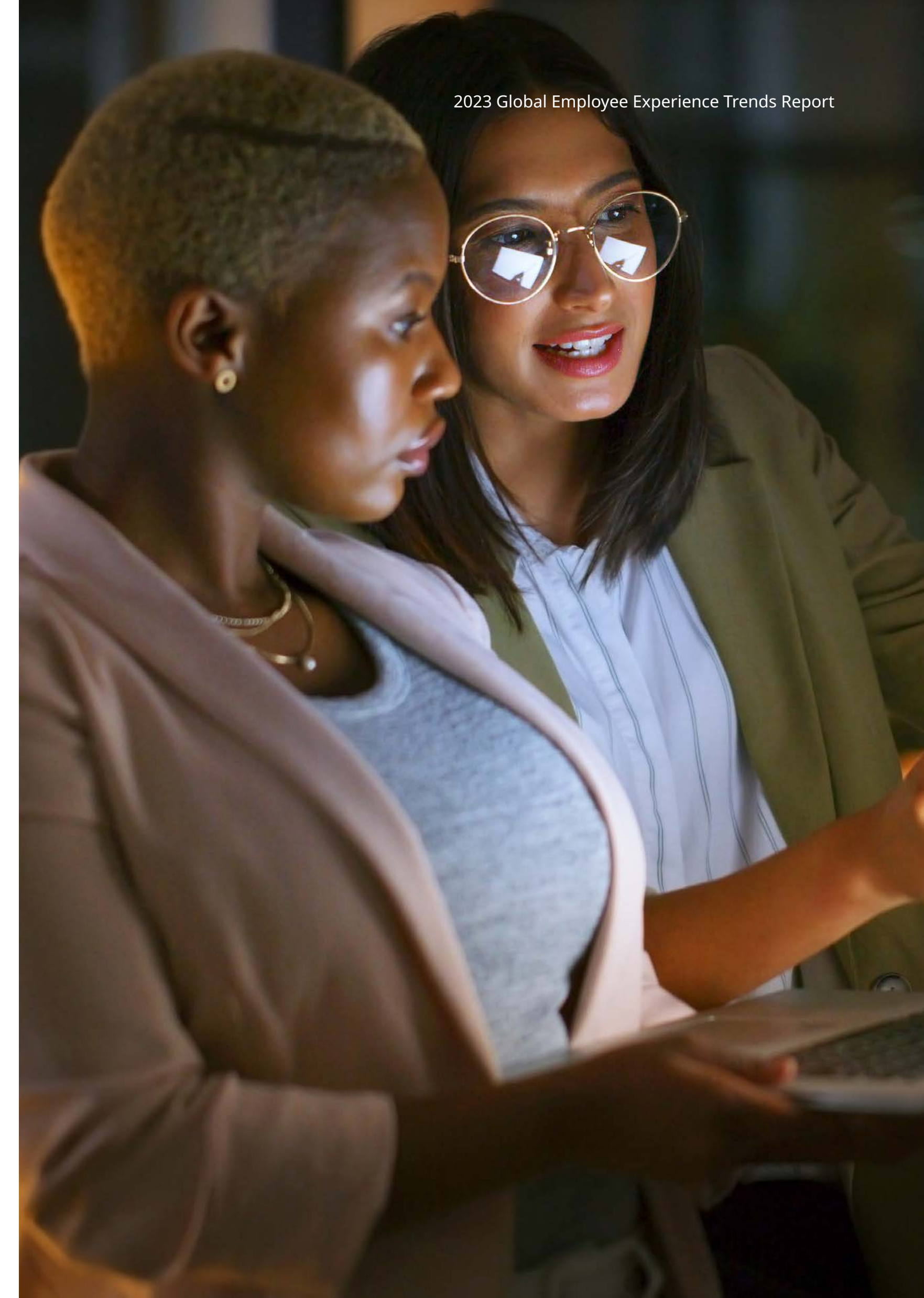
of organizations agree that a sustainable workplace helps to attract and retain talent.



agree strongly that they consider sustainability when building physical workplaces.



say workplace design is a key pillar in their organization's sustainability agenda.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Top performers are almost twice as likely as underperformers to strongly consider sustainability when building physical workspaces

(for example, through “green” design and practices and adherence to the WELL Building Standard)



The new wave of video- and AI-fueled EX technology can also contribute to sustainability. For example, intelligent meeting spaces with automated environmental controls make it simpler to manage energy consumption – avoiding overheating, say, or keeping devices powered down when rooms aren't in use.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Cloud-based models and security



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Cloud enables EX innovation and collaboration

95%

of organizations agree (46% very strongly) that cloud solutions are vital for enabling outcomes related to EX.

93%

of top performers are increasing their IT spend. 44% of these top performers report a **significant** increase in employee satisfaction.

Top 3 effects of cloud technologies on EX efforts

1. Improved productivity – better collaboration and communication
2. Improved security and legal compliance
3. Enabled workforce flexibility (hybrid model)

#1

Security is the top consideration for organizations when moving to the cloud.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

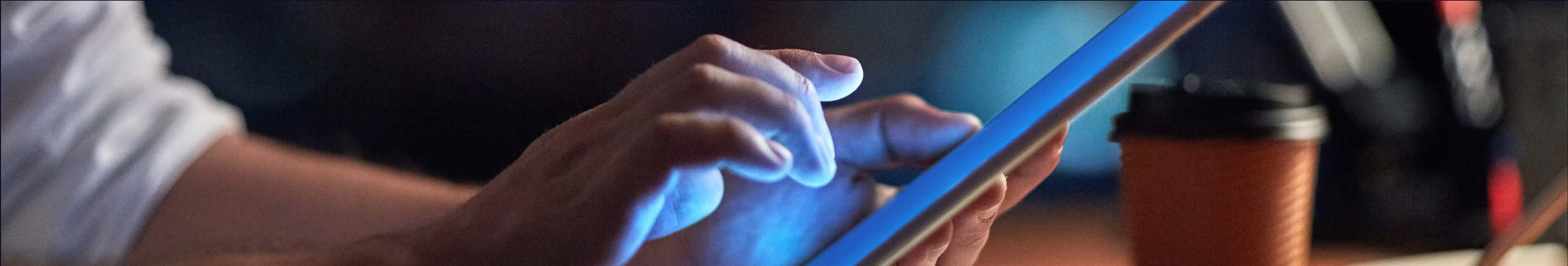
The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





The cloud has revolutionized the way organizations leverage technology. It's driving digital transformation through a range of features and functionality, and **nearly all organizations regard cloud solutions as vital for enabling their EX outcomes.**

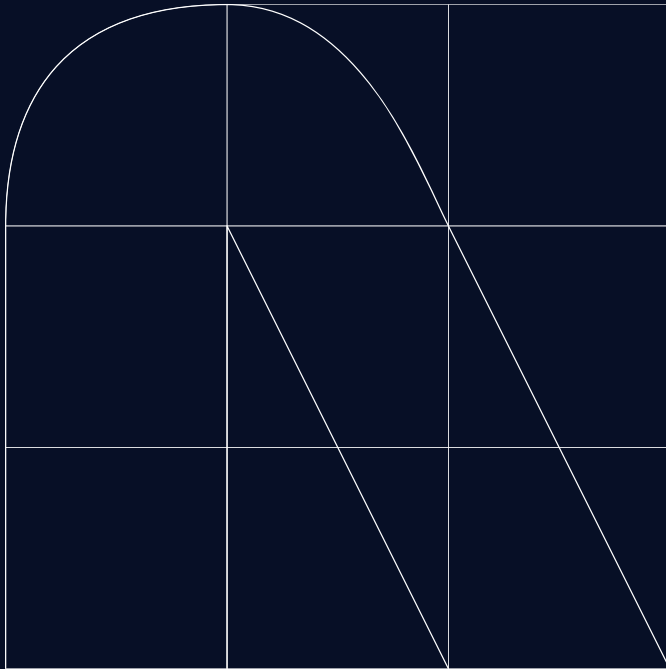
Few CIOs still consider installing an on-premises communications solution. Cloud-based communication is secure, scalable and affordable because organizations don't need to deploy their own infrastructure.

And, compared to the big-ticket licenses of the past for siloed, on-premises systems, cloud-based EX tools also tend to be more budget-friendly in terms of their flexibility to scale up and down and their month-to-month running costs.

However, security remains paramount and must be at the core of any cloud-based EX solution. Improved security, along with legal compliance, is one of the top five impacts of the cloud on EX, so organizations need to choose cloud technology that aligns with their industry and compliance requirements.

Banks and retailers, for example, have very different security and compliance needs, and data security regulations vary by region. Some jurisdictions are imposing restrictions on data leaving their physical borders, affecting how services are consumed.

From the employees' perspective, integrated cloud-based collaboration platforms help teams work together more efficiently and securely. The resulting boost in productivity is the highest-ranked effect of cloud on EX.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Cloud removes barriers to modernization and enables EX

9 in 10 EX leaders agree that evolving work and employee engagement models are driving new technology demands.



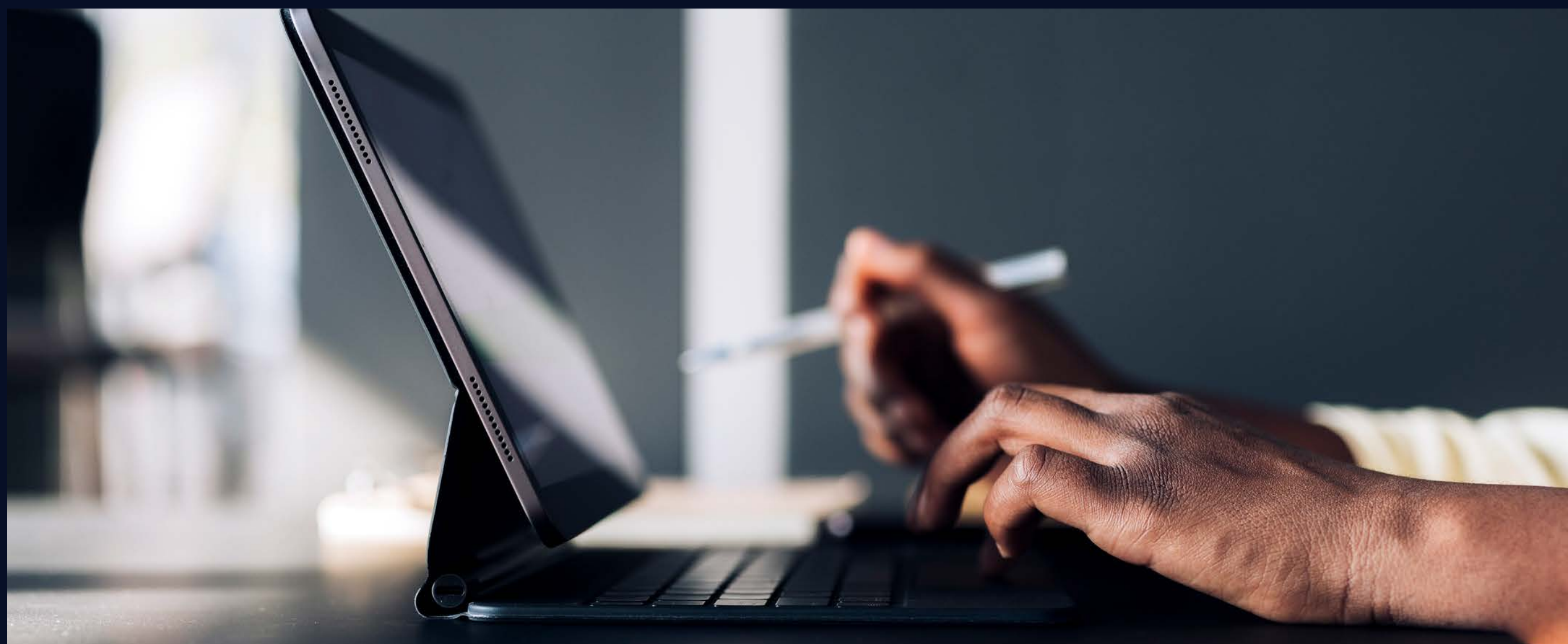
92% say legacy infrastructure is a significant barrier to business agility and the ability to optimize EX efficiency.



CHROs say that future-proofing technology infrastructure is the #1 effect that cloud technologies have on EX efforts.

Cloud is also about gaining access to innovation. Most AI engines are based in the cloud, so organizations that want to apply AI to improve their EX will need to migrate to the cloud or at least integrate with cloud services.

The cloud also allows organizations to launch proof-of-concept or pilot EX projects faster and more affordably as they leave behind their legacy infrastructure – which more than 9 in 10 describe as a significant barrier to attaining optimal EX efficiency. They no longer need to buy new licenses or integrate services that may not even work, and can validate their return-on-investment calculations without making long-term commitments.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Cloud technologies deliver better EX and CX

Cloud technology fuels improved employee performance, which enhances bottom-line results in remote and hybrid work environments.

Top 5 ways organizations say cloud has affected EX

- 1. Improved productivity** – better collaboration and communication
- 2. Improved security and legal compliance**
- 3. Enabled workforce flexibility** (hybrid model)
- 4. Improved integration** (i.e., access to a single integrated customer platform)
- 5. Ability to test new ideas/functionality** (trial without need for IT support)



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

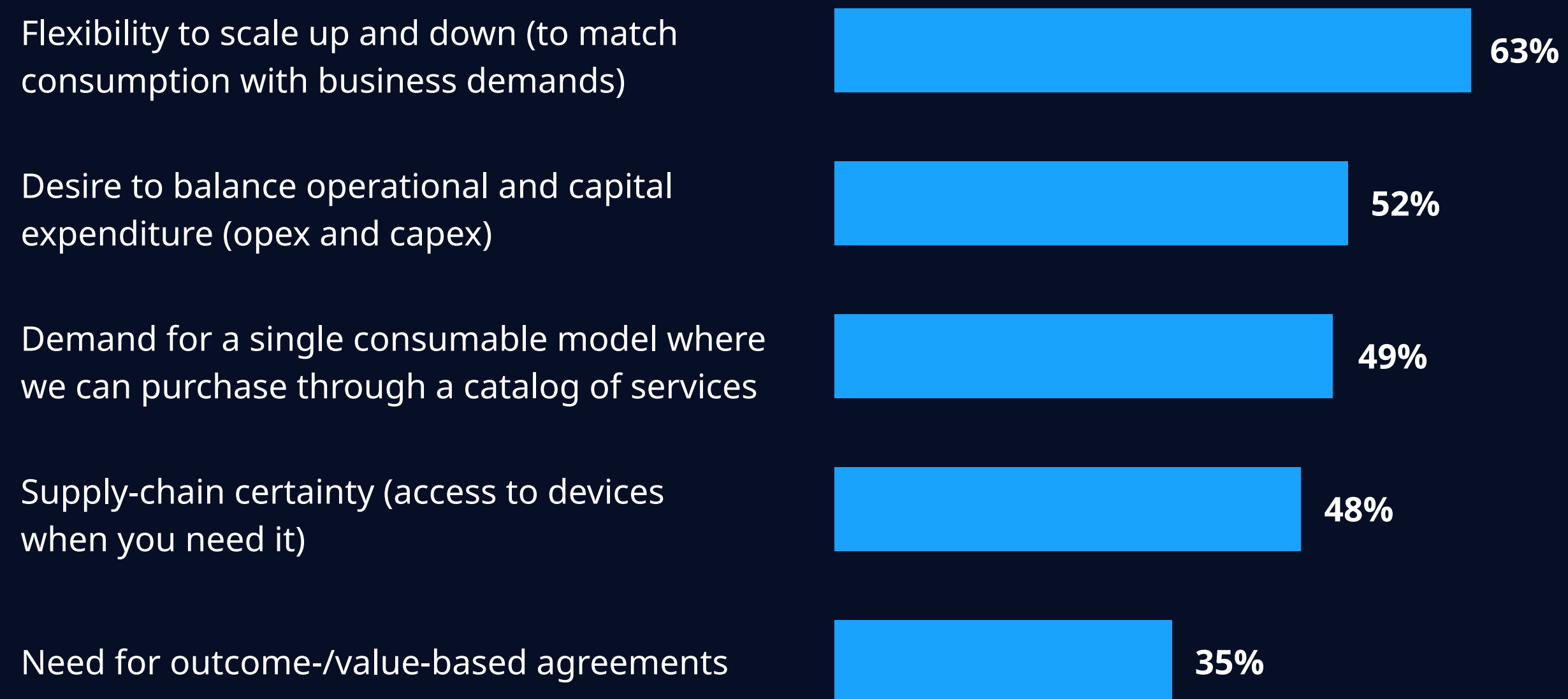
About us



Cloud-based models and security

Finding a cloud delivery model

Top 5 reasons to consider a unified-communications-as-a-service model



What are the top three things that would encourage your organization to consider a unified-communications-as-a-service (UCaaS) model? (Select up to three)

Base: All GROUP 4 - IT respondents (n=422)



98% of CIOs are using or open to using a UCaaS model.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





The benefits of UCaaS

Flexibility and cost-efficiency are top of mind when organizations consider a cloud delivery model such as unified communications as a service (UCaaS), which makes a comprehensive set of communication and collaboration applications and services available to enterprises. It can bring together a range of communication tools, such as voice calling, videoconferencing and instant messaging, into a single unified platform.

Because UCaaS is delivered over the internet, as a service, organizations can **do away with on-premises infrastructure** and focus on their core business operations. It's also highly scalable to match changing business needs, can lead to cost savings as organizations pay only for the services they use, and can be integrated with other business applications such as customer relationship management (CRM) or project management systems.

And, as with other managed services, the service provider takes responsibility for system updates and maintenance, giving organizations **constant access to new features and upgraded security**.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



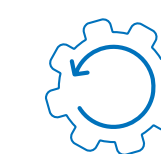
The challenges of migrating to the cloud



Security concerns about customer data held in the cloud



Need to wait to coordinate cloud migration with other workloads



Operational complexity of running multiple platforms



Getting multiple service providers/partners working together



Network performance and/or availability



Overcoming organizational silos/outdated work practices

Organizations need a very specific set of skills to manage a cloud-based platform, which presents some operational complexity.

Once they start to migrate to the cloud, they will also realize that not everything is cloud-native or cloud-ready – and, of course, it's a whole new world of cyber risks, making security their top concern.

Cloud also cannot be a standalone strategy that ignores other platforms or workloads in an organization. It has to be fully integrated. Working with one or more service partners with experience in this regard is useful, although having multiple partners will also require more coordination.

The health of the organization's network is another potential point of failure: without a fast, reliable and secure network, employees are likely to struggle to use collaboration and communication tools.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Cloud-based models and security

Security remains an all-important requirement

Organizations must balance cybersecurity with technology advancement, and robust security measures are paramount in protecting sensitive information.



94% of organizations agree that hybrid work has caused them to **increase their investment in data protection and security.**



Only 46% agree strongly that their current cybersecurity controls are effective in protecting and enabling their employees wherever they work.



Balancing cybersecurity with an organization's EX needs is paramount. **Hybrid and remote working have introduced new security risks:** the way employees access applications and data requires new security approaches, such as zero trust, even as the ongoing migration to the cloud delivers improved and continually updated cybersecurity.

So, as organizations try to find a balance between cybersecurity and technological advancement, they need robust security measures to protect sensitive employee and corporate information.

Ensuring organizations and employees are protected from security threats requires intentional leadership, which is why top-performing organizations are nearly three times more likely than underperformers to fully involve their CISO or cybersecurity team in their decisions about EX technology solutions.

However, many organizations recognize they still lack effective cybersecurity. Less than half the respondents in our research believe they have sufficient security controls in place to protect and enable their employees. They may lack in-house security expertise, but working with a third-party provider can circumvent that challenge and be more cost-effective too.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Investing in mobility



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Investing in mobility

If remote and hybrid working is here to stay, employees need to be able to do their work effortlessly in a range of settings, including while traveling to and from the office.

This is why organizations should invest in mobility to support employees – including those who consistently work in mobile environments, such as salespeople or consultants operating in different office locations.

The ease with which they can access all their data, the quality of meeting interactions and the speed of connectivity – all underpinned by strict security to protect both corporate and customer information – are now critical factors that will affect EX.

Providing an environment where employees can work effectively, regardless of location, is therefore fundamental to ensuring productivity and maintaining employee satisfaction. People should be able to collaborate and communicate easily with their colleagues.

For business leaders, the significance of **mobility is closely related to the adoption of remote or hybrid work models**. Even in organizations that do not fully embrace remote work, it's likely that a portion of the workforce requires mobile capabilities.

Putting an effective mobility strategy in place is therefore vital to keep technology, internal policies and security measures from hindering employees' ability to work in mobile settings. Our research shows that top-performing organizations are already three times more likely than underperformers to have significantly increased their investment in mobility.

Such policies may also attract younger generations entering the workforce – including “digital nomads” who use technology to work remotely so they can travel to and live in different locations while maintaining their jobs or businesses.

Mobility in action



Imagine joining a work call while one of your colleagues is taking their morning walk – in a forest. When they complete the walk, halfway through the meeting, good mobility means they can transition easily from the device they took on their walk to the laptop in their home office.

Microsoft Teams, for example, makes such a transition seamless. The audience may not even notice, unless the person has activated their camera on both devices. The meeting transcript and content remain intact, fully searchable and attributed to a single user, rather than appearing as two separate users who joined at different times.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Prioritization and growth of mobility investments

73%

of organizations say hybrid and remote working needs have led to their investing in mobility in the past two years.

3x

Top performers are three times more likely than underperformers to have significantly increased their investment in mobility in the past two years.

Top 3 mobility areas prioritized for investment

1. Business-grade internet connections (4G/5G broadband, SD-WAN)
2. Application and software development and investments (Microsoft Intune, etc.)
3. Mobile device management security and support

Nearly 50%

Those that have made significant investments in mobility are nearly 50% more likely to report a significant increase in employee satisfaction than those who have made only some investment.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Investing in mobility

Mobile device management: making the connection

Mobility policies often include bring-your-own-device (BYOD) allowances, so employees can use their personal laptops and devices for work.

However, while employees may appreciate using their own devices, this raises challenges in terms of security, data protection and access to corporate data and applications. Catering to a diverse array of technology choices, such as Android or iOS devices, also adds complexity.

Mobile device management (MDM) refers to the administration and tracking of these devices within an organization, including software that enables IT teams to regulate some aspects of these devices, regardless of their physical location.

Devices need to connect to the organization's applications in a controlled and secure manner, often with certain settings and configurations automatically enforced and updated over time. The organization might also ask the employee to install specific applications on the device, such as Microsoft Teams.

From a security perspective, MDM means enforcing the organization's security policies on these devices to protect data and allow for the remote locking or wiping of lost or stolen devices.

Organizations must balance all of these aspects of MDM with respecting their employees' privacy. This can be achieved by separating personal and work-related data on these devices.

Also rising in importance are fixed-mobile convergence and mobile-first strategies. Now that so much communication has shifted to Voice over Internet Protocol (VoIP) on employees' mobile devices, organizations are rationalizing telephony. There is less and less telephonic contact between colleagues, at least within the same organization; calls are placed mostly through Microsoft Teams, Cisco Webex and similar platforms.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Investing in mobility

Investment areas in mobility

Mobile and remote-working tools are key to EX advancements

The majority of organizations say hybrid work has accelerated a need for application and device management tools, driving investments in MDM security and support.



99% of organizations are investing in at least one area of **mobility**.



Nearly 3 in 4 consider **mobile and remote-working tools and networks** (MDM, devices, headsets, etc) as **key enablers** to reshape or improve EX within the next three years.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

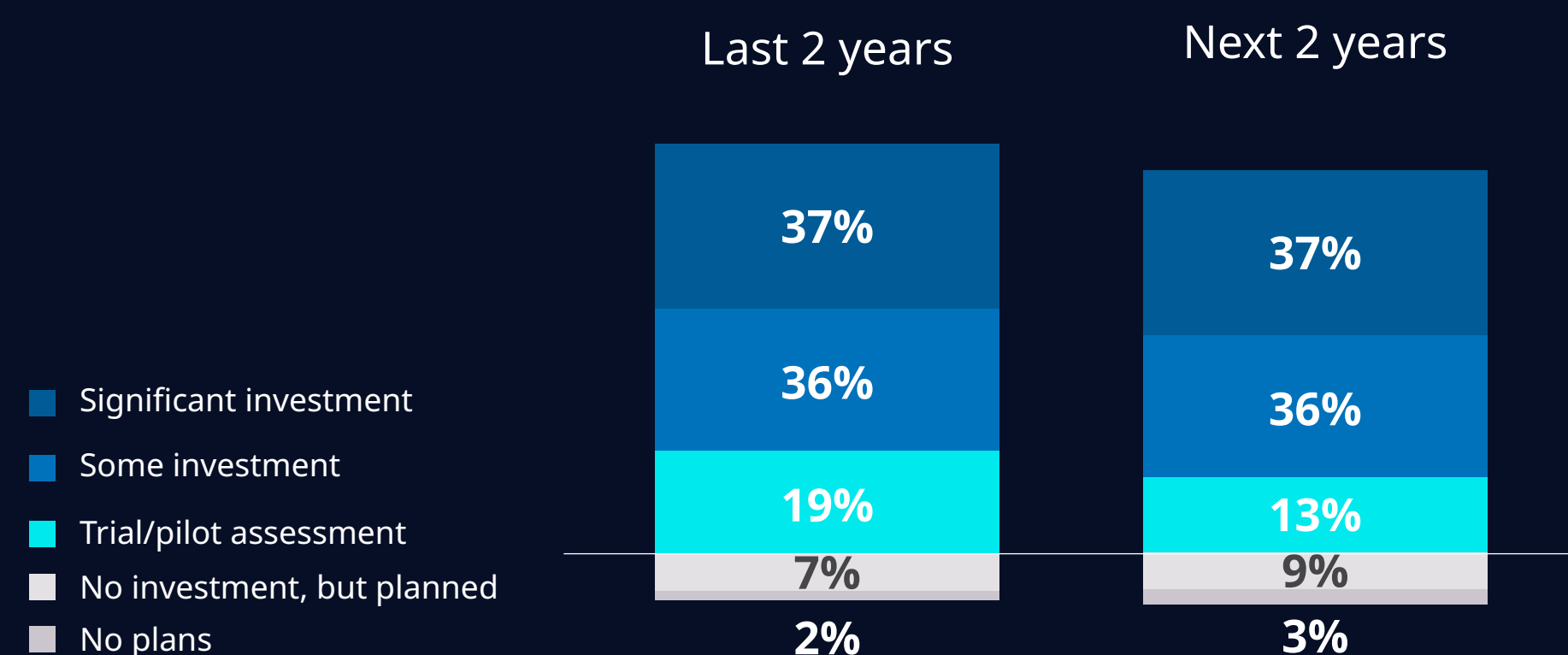
About the research

About us



The C-suite appears confident that enabling remote working through mobility will continue to benefit organizations: 73% of organizations have invested in mobility in the past two years because of the impact of hybrid or remote working – half of those at a significant level – and 75% say they will continue investing in the next two years.

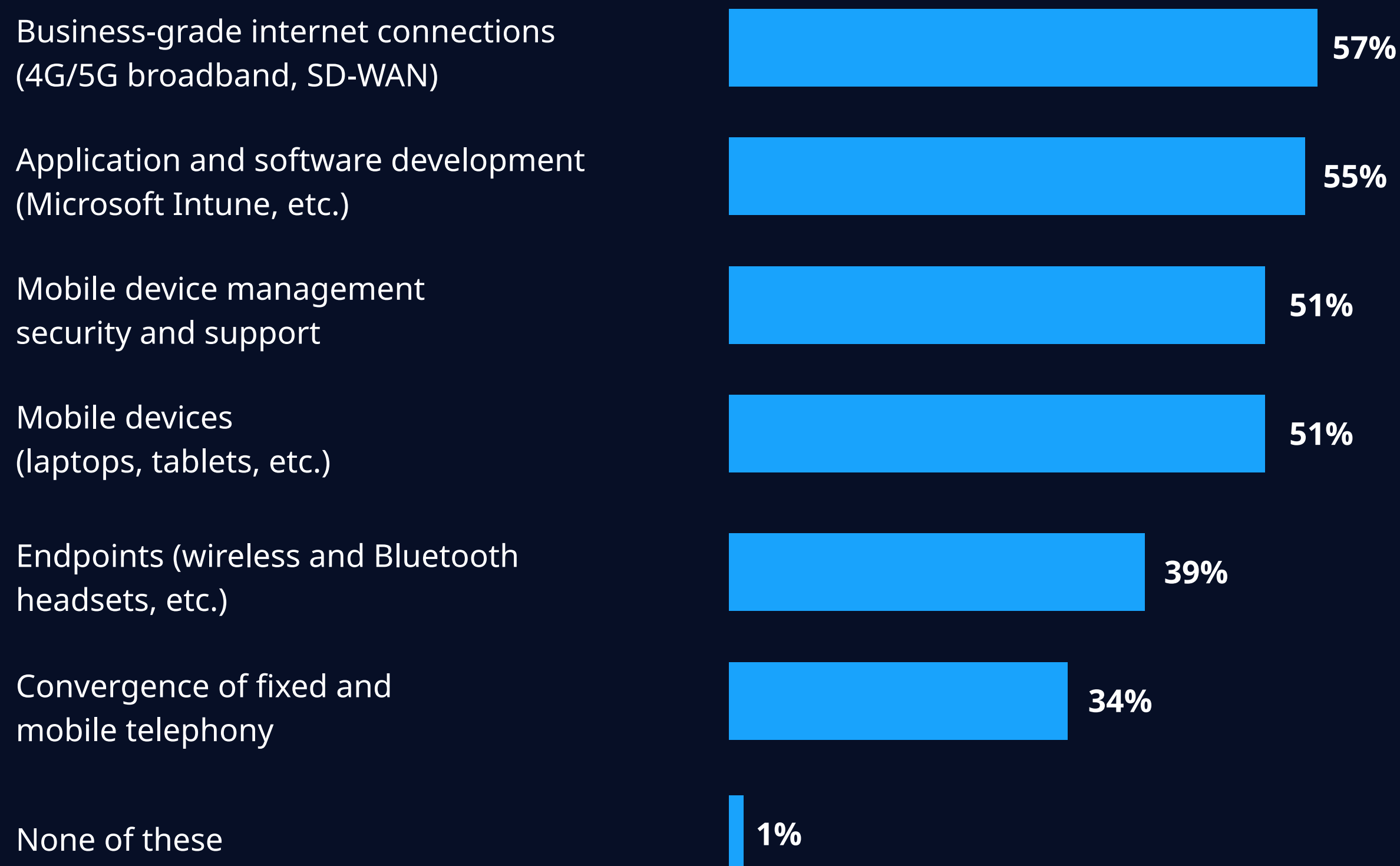
How much has been invested in mobility?



How has hybrid/remote working impacted your organization's investment in mobility over the past 2 years/ in the next 2 years? (Select one for each). Base: All GROUP 4 – IT respondents, excluding DKs (n=418/416)

Most organizations have invested in business-grade internet connections, application and software development, mobile devices and MDM.

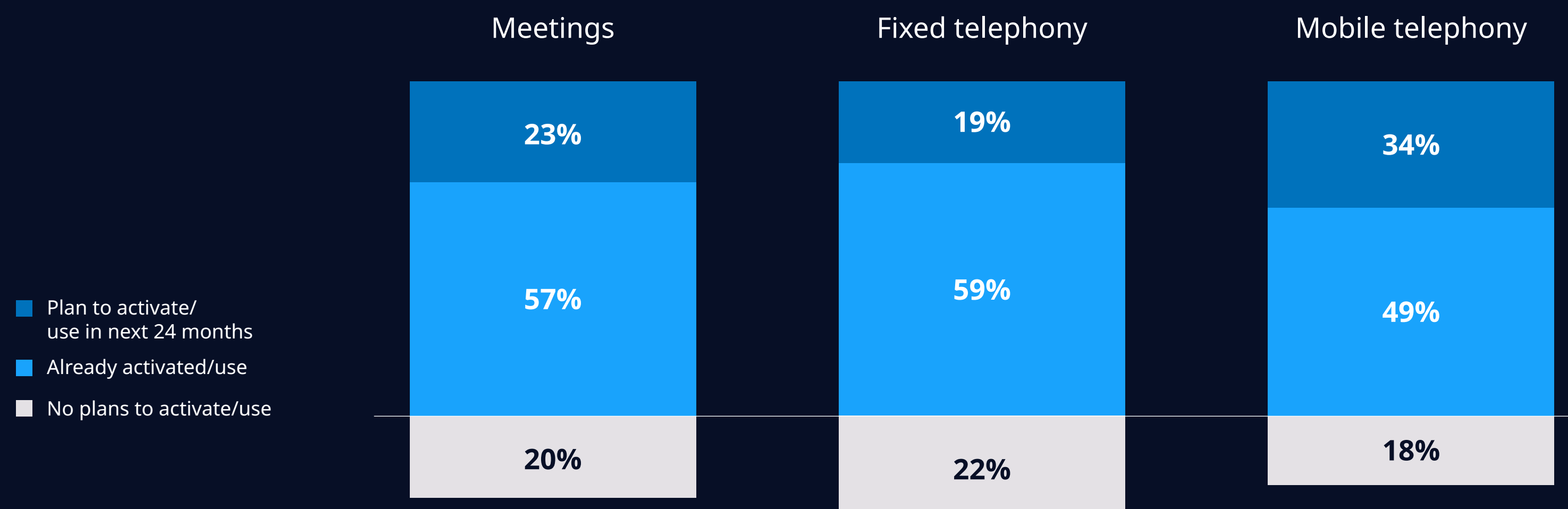
Top investment areas for mobility



Which, if any, of these areas of mobility has your organization invested in/prioritized? (Select all that apply)
Base: All GROUP 4 – IT respondents (n=422)



Organizations are prioritizing their investment in mobile telephony above other communication channels to meet the demands of hybrid and remote working.



Has your organization activated, or do you have plans to activate, voice or meetings on this platform in the next 24 months? (Select one for each)
 Base: All GROUP 4 – IT respondents with a preferred platform, excluding DKs (n=399-404)

To address challenges in employee device compatibility, organizations need to ensure their underlying EX technology is cross-compatible between platforms, devices and operating systems.

Privacy and security are also significant considerations when organizations invest in mobility solutions, especially if they have a BYOD policy in place. They must carefully evaluate the technologies they adopt and choose appropriate MDM tools to ensure security.

A key factor in mitigating these concerns is integrating security features seamlessly into the overall user experience. The more integrated security is with technology and productivity tools, the better the experience will be for users.



The convergence and strategic alignment of EX and CX



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The convergence and strategic alignment of EX and CX

Recognizing the direct impact of CX on business growth, most organizations strive to improve CX at every touchpoint – many of which are now digital.

However, there is also a fast-growing realization that a great CX strategy also relies on an EX strategy that covers new ways of working (such as hybrid work models) and technologies like collaboration and mobility tools that enable and empower employees.

It therefore becomes imperative for organizations to find strategic alignment between these two areas. **Involved and empowered employees drive exceptional CX**, and enabling employees and incorporating their feedback into business processes can have a significant impact on organizations' ability to retain and grow their customer base.

More than half the CEOs in our research strongly agree that EX and CX strategies should be closely aligned and underpinned by strong cybersecurity and a cloud strategy to maximize their impact on business growth.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Those who succeed in EX are more likely to succeed in CX

50%

Organizations that have significantly increased employee satisfaction see a 50% increase in customer satisfaction (CSAT).

97%

of organizations that identify as an employer of choice achieve promoter-level CX ratings.

67%

Organizations with highly engaged employees are 67% more likely than the rest to achieve promoter-level CX.

96%

of organizations agree that CX and EX strategies must be closely aligned to maximize their impact on enterprise growth.

The blending of EX and CX drives real-time communication and collaboration. This includes a seamless flow between what's customer-facing – an organization's interactions with its customers – and how employees interact with their own workplace and toolsets.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

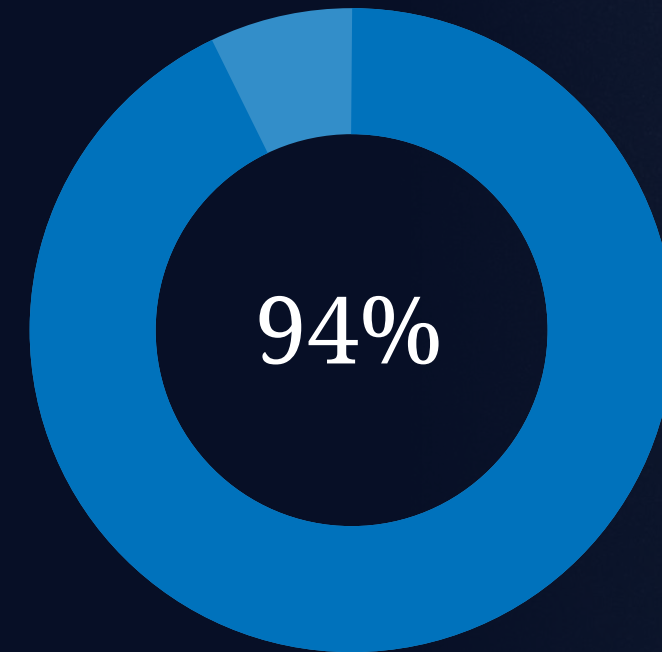
About us



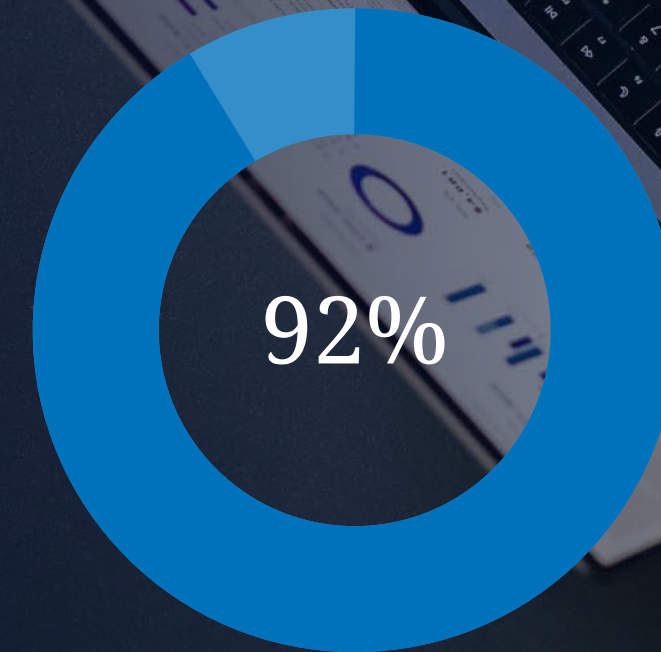


30%

Organizations that have improved their ESAT also show a 30% increase in their share of customer value or wallet (including customer retention).



of CEOs agree that making EX improvements to empower employees and drive efficiencies will improve CX and directly affect their net profit.



say they capture voice of employee (VoE) data to inform product, service and process improvement.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Organizations with both CX and EX strategies in place are almost six times more likely than all others to achieve promoter-level CX performance, as measured by their Net Promoter Score (NPS).

However, this alignment can be almost impossible to implement in siloed organizations where CX and EX are managed separately and are not aligned with business and technology strategies.

Only 44% of organizations say their EX strategy is fully aligned with their business strategy and, while this figure rises to 60% for their CX strategy, there is clearly room for improvement in both areas.

Furthermore, more than half (58%) of organizations say their EX and technology strategies are not fully aligned, and 56% say the same about their CX and technology strategies – even though such an alignment makes reaching a promoter-level NPS of 76% for EX and 67% for CX more likely.

[Introduction](#)[The crucial impact of modern EX strategies](#)[The importance of supporting hybrid working](#)[Cloud-based models and security](#)[Investing in mobility](#)[The convergence and strategic alignment of EX and CX](#)[Conclusion and next steps](#)[About the research](#)[About us](#)



Organizations with both EX and CX strategies are five times more likely to receive promoter-level customer ratings than those without.

Yet, 60%
struggle to align both their CX and EX strategies to their business strategies.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The convergence and strategic alignment of EX and CX

How CX is being transformed

CX delivery is influenced by how organizations adapt operating models for remote, hybrid, and on-premises work.



Organizations need to ensure customer service quality and speed, **regardless of employee location.**



To achieve this, they need **collaboration and customer relationship management tools, knowledge management systems, systems integration and virtual learning platforms** to support their employees, all underpinned by **cybersecurity skills.**

The changing work environment and new employee expectations are also affecting CX strategies. Hybrid and remote working have become more commonplace, and organizations have to find ways to provide their employees with collaboration-enabling technology to achieve higher levels of employee satisfaction and productivity. In turn, these advances in EX can support improved CX delivery.

Our [2023 Global Customer Experience Report](#) shows how organizations are evolving their technology architecture to enable both CX and EX success. Cloud, network modernization, AI and hybrid work are their top priorities.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The convergence and strategic alignment of EX and CX

Finding alignment between EX and CX



The alignment of EX and CX often begins with upgrading technology in the organization rather than being the result of a conscious decision to converge these two strategies.

There are two primary factors at play. First, internal needs arise to upgrade either the EX or CX toolset, which naturally sparks conversations about how the other strategy will be affected. For instance, upgrading to cloud telephony might prompt discussions about integrating the CX solution that was initially connected to the legacy private branch exchange (PBX).

Secondly, vendor direction plays a role. Many vendors are moving toward better integration between their CX and EX solutions. For instance, CX vendors offer native integrations with the products of their EX counterparts, making it easier to align the strategies.

Depending on whether organizations start with EX or CX, this convergence might also be encouraged by the technology landscape itself. For example, if they subscribe to Microsoft's UCaaS, they might consider integrating with cloud contact-center solutions like Genesys Cloud instead of using on-premises solutions.

Or an organization might want to migrate from an on-premises PBX to Microsoft Teams but is already using Cisco Webex Contact Center, which can be integrated with Teams. This means the organization can have their contact-center agents working from home, as it's easy for them to escalate a problem to a subject-matter expert elsewhere in the business.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



A new kind of experience

As the positive effects of EX spill over into CX, organizations are more likely to see their employees and customers as interconnected components of business success.

The rise of advanced technology, including AI enhancements, is ushering in an era of digital experience (DX) – a new, all-encompassing concept bridging EX and CX. This approach is gaining more traction, as it can give decision-makers insights into how one aspect of EX or CX influences another.

DX involves a continuous flow of seamless interactions, using technologies that apply to both internal communication and external engagement across different communication channels. It can include bots and AI-assisted interactions alongside more direct human involvement.

[Introduction](#)[The crucial impact of modern EX strategies](#)[The importance of supporting hybrid working](#)[Cloud-based models and security](#)[Investing in mobility](#)[The convergence and strategic alignment of EX and CX](#)[Conclusion and next steps](#)[About the research](#)[About us](#)

The convergence and strategic alignment of EX and CX

How AI is shaping EX and CX

Our research shows that, across all organizations, **AI is seen as the number-one enabler of future EX and CX strategies**, with AI interfaces expected to become the norm for 4 in 5 organizations within the next year.

AI already plays a significant role in shaping new work models – for instance, by making it easier to use corporate tools and apps on personal devices to enable remote work beyond just laptops.

76% of operations managers say AI and automation are making a significant impact on removing drudgery from agent interactions.

The majority say digital contact channels mostly offer the same and/or better CX than human-led interactions.

Top 4 benefits of AI automation

- 1 Improved efficiency**
(core business process automation)
- 2 Improved customer experience**
(real-time assistance/convenience)
- 3 Improved employee experience**
(removal of mundane tasks)
- 4 Business insights**
(user psychology/machine learning)



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Increasing trust in AI

An organization can also apply AI to help an employee search for the right answer to a customer's question – for example, by automatically connecting a contact-center agent automatically to an expert elsewhere in the organization, or by presenting possible resolutions from the AI's own knowledge base. This makes the interaction with the customer faster, more effortless and more efficient.

Employees are also increasingly familiar with AI, which means they have more trust in this transformative technology.

Our research shows that **resistance to automation has declined since 2020**, while the design of user experiences in this area has improved, although there has been a small increase in concerns about AI-related ethics and discrimination.

[Introduction](#)[The crucial impact of modern EX strategies](#)[The importance of supporting hybrid working](#)[Cloud-based models and security](#)[Investing in mobility](#)[The convergence and strategic alignment of EX and CX](#)[Conclusion and next steps](#)[About the research](#)[About us](#)

The convergence and strategic alignment of EX and CX

But is it working? AI and analytics

Analytics in EX has increased in complexity since EX has evolved from an HR-centric focus on employee wellbeing to being seen as a technology-fueled contributor to business success.

Top-performing organizations are 52% more likely than underperformers to use employee analytics to monitor productivity, while more than 9 in 10 organizations overall capture voice of employee (VoE) data to inform product, service and process improvement.

However, the success of EX in an organization isn't linked solely to the technology. It's the overall experience, including employee satisfaction, that must be evaluated.

This is another area where AI can make a real difference because of its analytical capabilities. It fuels predictive and powerful real-time analytics that organizations can use to deliver data-driven EX insights, and it enables employees to do their jobs better. AI can:

- Monitor applications and devices, providing quality and performance metrics.

- Create a different perspective on room arrangements, equipment usage and so forth. For example, if one meeting room is always empty while another is consistently full, analytics can help. Is it because one room is in a better location and has superior equipment? Or are there persistent equipment failures that go unreported in the other room?
- Analyze the success of a call and determine whether participants are remote or in-office, whether they're on Wi-Fi, and even their choice of devices.
- Track how meetings are conducted, including whether participants interact via chat, share content or ask questions. Analytics that relate to how employees interact with technology and how groups of employees interact with each other can be useful. For example, collaboration tool data might show that sales and marketing rarely communicate. Is it because they feel disconnected? Do their managers not encourage collaboration? Or do employees lack the right tools or processes?



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



AI-enabled tools can be used to combine some or all of these factors to measure the overall effectiveness of an EX strategy in an organization. For example, data on employee engagement, interaction and satisfaction can be combined with employee NPS figures, which relate to loyalty and advocacy, to paint a more complete picture of EX success.

Other types of EX analytics

- Surveys and similar tools can be used to measure employees' satisfaction with, for instance, their work environment, their compensation and benefits, their work-life balance and their career development. However, surveys can be skewed by employees who severely dislike their work environment or those who are overly positive and avoid pointing out issues with their EX.
 - Other metrics include gauging how willingly employees endorse their employer. For job postings, are they referring their friends or advocating for their organization externally? Platforms like Glassdoor can provide insights into this.
 - An organization's ability to attract top talent and retain staff is another notable metric, albeit one that is hard to measure.
 - Organizations that invest in employee learning and development programs can also measure training hours, participation rates, career progressions and more to ensure the content remains relevant and that staff engage with these programs.
-

[Introduction](#)[The crucial impact of modern EX strategies](#)[The importance of supporting hybrid working](#)[Cloud-based models and security](#)[Investing in mobility](#)[The convergence and strategic alignment of EX and CX](#)[Conclusion and next steps](#)[About the research](#)[About us](#)

The convergence and strategic alignment of EX and CX

Intelligent collaboration through AI

AI capabilities within a collaboration suite like Microsoft Teams are becoming more remarkable by the day. Users can get an instant transcript and recording of a call which can then be edited as needed, allowing them to remove sections before, for example, sharing it with clients. AI can also produce a full meeting summary and remind participants of key discussion points or decisions. Emerging solutions can also allocate prescribed actions and track the completion of tasks.

This technology is fast evolving, to the point where issues relating to varying accents and regional differences in language are being eliminated.

Looking ahead, AI will keep delivering increasingly significant value to organizations, from improving operational efficiencies and reducing their carbon footprint to optimizing costs. For instance, they might rethink their real-estate needs and workplace designs based on AI-driven data, leading to a reduction in both costs and environmental impact.

“

Talent optimization is a great area of focus for AI in EX. Employees value both flexibility and career development, which also supports business growth. An intelligent career hub can link employees to personal development plans and certifications – skills are the new currency. An employer can grow these skills in a frictionless way through technology: “quiet hiring” refers to upskilling the pool of talent in an organization so people know they have a future there. It’s critical.

— **Hugues Treguier**

Vice President: Product Marketing and Go-to-Market at NTT Ltd.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The convergence and strategic alignment of EX and CX

AI and the human element

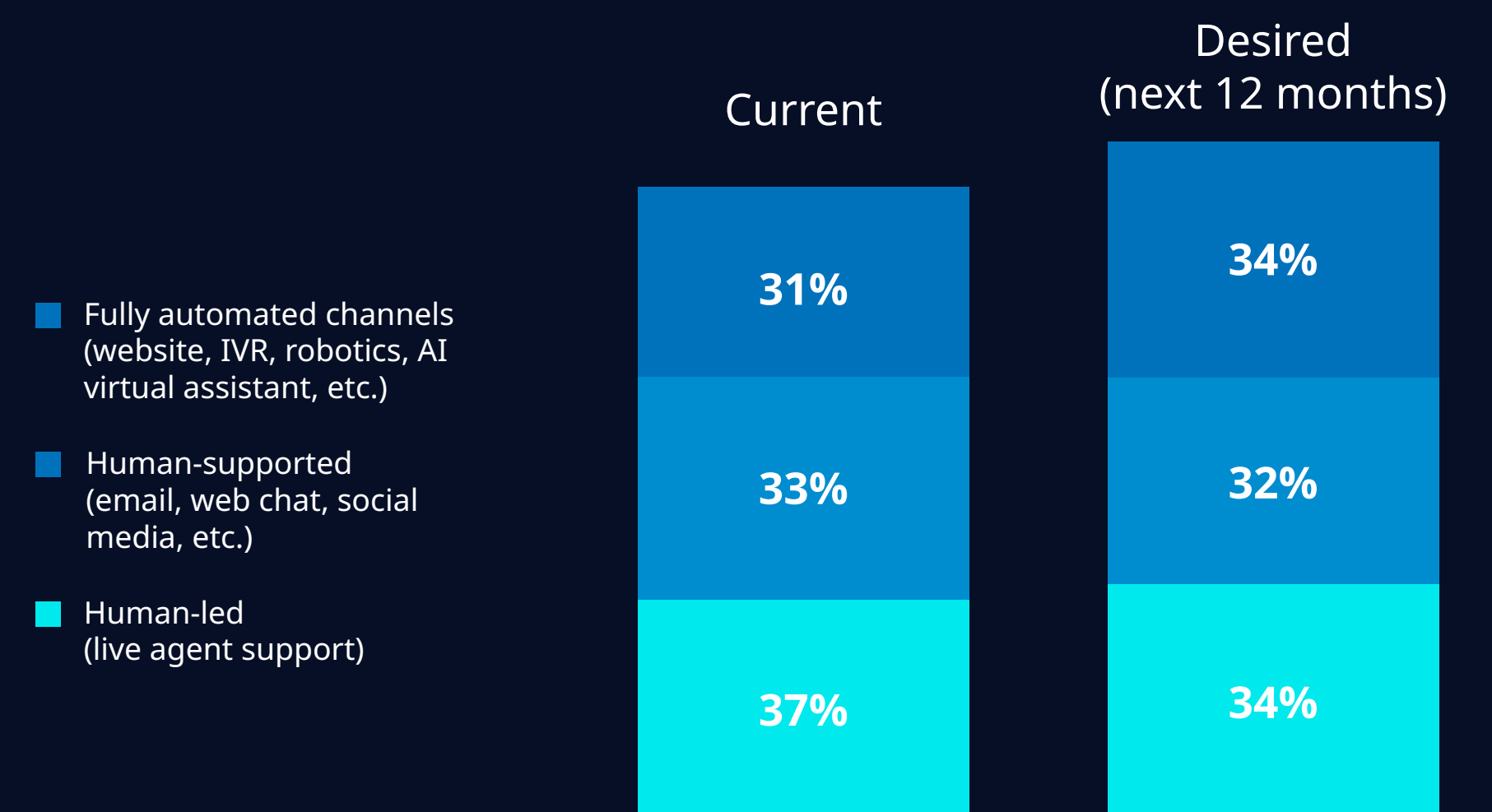
Two-thirds of operations managers in our research say that AI and automation have had a significant impact on removing drudgery from their employees' jobs.

Yet, many **employees feel deeply concerned about AI**, fearing that its widespread use will result in job losses. So, employers must leverage AI responsibly and communicate AI-enabled achievements to staff to help allay fears.

The human element remains important even as this new technology gains traction. A symbiotic relationship is developing between skilled employees and AI tools, with benefits in terms of operational efficiency, productivity and the bottom line.

In CX, human-supported channels such as webchat or email and human-led interactions are holding strong against fully automated channels – including AI assistants – as customers still prefer dealing with a human at a certain stage of their CX journey. Nearly 9 in 10 organizations agree that **human-led support remains critical.**

Average % of CX interactions via each channel



What are your current and desired splits of CX interactions across the following channel groups? (Enter number from 0-100 for each)
 Base: All GROUP 2 – CX and GROUP 4 – IT respondents, excluding DKs (n=975/959)



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



AI is rising, but skilled people remain important

Most organizations are currently automating 25% to 50% of their interactions and expect this to increase over the next 12 months. Interactions via direct and indirect CX channels are expected to be much the same in the next 12 months.

#1

AI is voted as the **top enabler of future CX and EX strategies**. AI interfaces are rising to become the norm for 4 in 5 organizations within the next 12 months.

87%

of organizations agree that human-led support remains a critical element in their customer engagement.

88%

say that improved process automation has led to key performance indicators (KPIs) evolving to drive a higher level of operational efficiency.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

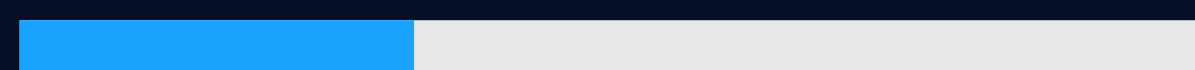
Conclusion and next steps

About the research

About us



Less than 30% of organizations are using AI to collect and interpret customer and employee data, and a lack of skills is holding back AI-driven automation efforts – which means employees with newly acquired skills in these areas will be in demand. HR policies must therefore facilitate upskilling in CX and related areas so that employees can develop new skills and move into more meaningful and strategic roles.



Only **29%** of organizations are using AI (including machine learning) to collect and interpret customer and employee data.

#1

CHROs consider lack of skills as the main issue affecting the use of AI and automation.

#1

The biggest challenge to optimizing customer journeys is a lack of data and the inability to gain insight from analytics.

The true power of AI lies not in replacing people, but in enhancing their capabilities and enabling them to achieve more. While AI can handle certain automated tasks, it can never fully replicate human intelligence and capabilities. A robot could never hold a comprehensive meeting discussing the benefits of a managed service solution, for example.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Conclusion and next steps



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Conclusion and next steps

Key takeaways and recommendations

The EX narrative has changed and is now focused on technology enablement



The hybrid factor

Organizations need to motivate and enable employees wherever they are, while keeping them focused on tasks where humans deliver true value.



Leverage collaborative technology from expert partners to empower employees, optimize productivity and enable flexible work.



Cloud is critical

Cloud computing has revolutionized technology, enabling organizations to connect employees securely, no matter where they work.



Explore cloud-based tools for communications and collaboration, underpinned by security, to drive EX capabilities.



Mobility is key

To enable employees wherever they are, organizations are investing in mobility and reaping the benefits.



Invest in MDM, business-grade internet connections and software that keeps employees connected.



The CX-EX link

EX directly affects CX and an organization's profitability. Satisfied and engaged employees deliver exceptional customer service.



Align EX and CX strategies to create a holistic approach that supports employee wellbeing and customer satisfaction.

Security underpins all EX priorities and strategies.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Conclusion and next steps

Finding the solution

Staying on track with expert help

Organizations are choosing to work with service providers to address priorities efficiently. Managing the complexities of the technology landscape with a partner leads to improved productivity and business agility.

9 in 10

say the pandemic and other macroeconomic factors have forced **in-house IT teams** to focus on **core business activities**. **Complex EX workloads** are increasingly **outsourced**.

Over half

have increased their spend on vendor/ third-party service providers as the result of macroeconomic factors affecting EX/CX budgets.



Top 3 factors in selecting a partner

- 1 Leading innovation/strategic vision
- 2 Enhanced cybersecurity
- 3 Improved service delivery

Top 3 challenges to managing multiple vendors

(among organizations that have not aligned their technology and EX strategies)

- 1 Limited integration between different vendor products
- 2 Using multiple vendors is expensive
- 3 Availability of skilled resources to manage multiple vendors



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



The value of a managed service provider

Organizations that move too quickly, without doing their homework, can end up frustrated by cloud-based EX solutions that are not fit for purpose. Rushing out to buy the latest toys with no real integration plan isn't advisable. On the other hand, keeping too much of the EX environment on-premises is likely to remain expensive and limit the evolution of EX in an organization.

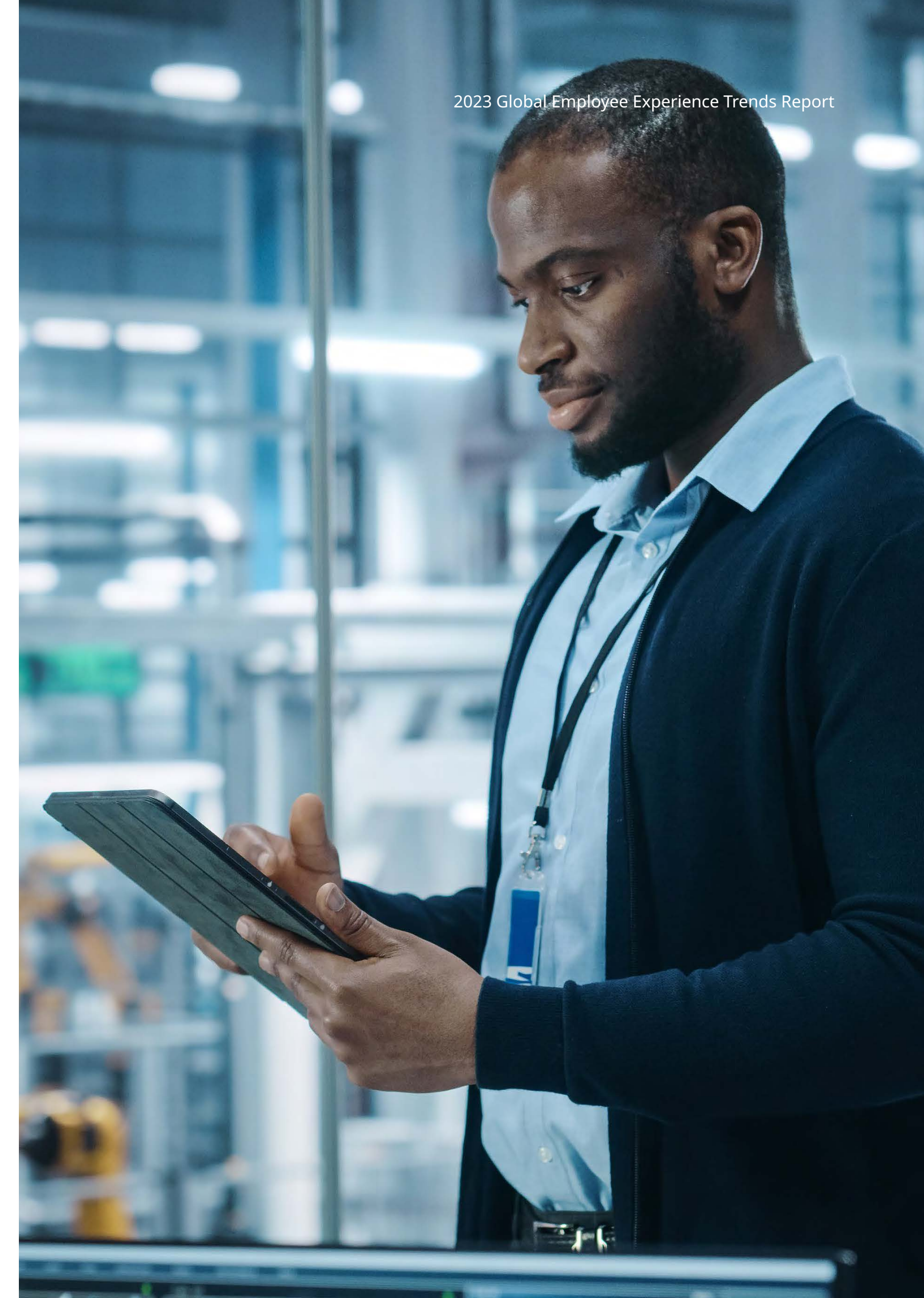
Selecting the appropriate technology is just the start, however. A unified solution like Microsoft Teams or Cisco Webex will automatically ensure a relatively seamless user experience, whether on mobile devices, desktops and laptops or in meeting rooms.

Change management, training and governance are also key – especially for highly mobile workforces or field workers who rely on rugged phones rather than laptops.

Online resources such as Microsoft and Cisco training courses do not fully cover the practical implementation and usage of these EX solutions. Aspects like compliance, data governance and data protection must also be factored in.

To address all these priorities fast and efficiently, organizations often opt to work with a managed EX service provider like NTT DATA to help them improve productivity and employee satisfaction, with a measurable impact on business flexibility and speed, without the need for additional investment in in-house skills and staff.

Our research shows that the majority of organizations are now turning to third-party support and managed services to make their adoption of new EX technologies as smooth and efficient as possible.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





Conclusion and next steps

Valuable skills on-demand

A managed service provider's range of skills and experience can prove invaluable.

Migrating an organization's EX to the cloud cannot follow a one-size-fits-all approach. It requires a lot of preparation and several predefined cloud-migration methodologies to clearly document the scope, followed by rigorous change management that takes all these parameters into account. A managed service provider can step in with the skills and experience to manage the depth and complexity of the systems involved.

And, when something goes wrong, the managed service provider can act quickly and decisively to rectify the situation (or act proactively to avoid the problem altogether).



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





In conclusion

EX has been redefined to focus on technologies that:

-
- 1 **Enable the employee**
 - 2 **Drive empowerment**
 - 3 **Create optimal efficiency**
-

“ Organizations need to embrace new technologies to evolve their EX.”

NTT can help you navigate the new world of cloud-enabled EX

Our experience in migrating organizations to the cloud, combined with our proven EX capabilities, will complement your existing infrastructure and services to give you a competitive edge.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





Why organizations work with NTT DATA

Organizations looking to improve their EX cannot just buy an off-the-shelf solution and think they have addressed the problem.

This is where the relevance of a managed service provider like NTT DATA becomes clear: not only do we provide a technology platform, but we also adapt that platform to enable business outcomes for our clients.

We customize the platform for specific industries and clients' business needs, and we set up productivity and efficiency metrics so they can better understand their spending.

And, as CX and EX technologies become better aligned, our clients need integrations on the back end as part of their contact-center-as-a-service solution, because they should be able to learn from all customer interactions, improve on them and feed the data into the rest of their business.

Learn more about our CX/EX Consulting Services.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



About the research



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

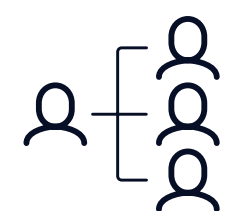
About the research

About us



The research in numbers

Conducted on behalf of NTT DATA by Jigsaw Research in April 2023



Role levels

C-suite: 61%
 VP/Head of/Director: 28%
 Senior Manager: 11%

Includes

CEO: 11%
 COO: 10%
 CXO/CSO/CCO: 9%
 CHRO: 4%
 CIO/CTO: 13%



Expertise

EX: 1,014
 IT: 442

Includes

Principal decision-maker/
 part of decision team:
 >8 in 10

 Decision/budget
 influencer: <2 in 10



Organization size

1,000 to 2,500: 26%
 2,501 to 5,000: 25%
 5,001 to 10,000: 26%
 10,001 to 50,000: 15%
 50,001+: 8%

Includes

USD 1 billion to USD 9.99 billion: 41%
 USD 10 billion or more: 21%

1,442 interviews

across 14 sectors, including:

17%

Financial services

10% | 6%

Manufacturing |
 Automotive

12%

Technology

10%

Health/healthcare/
 pharmaceuticals

8%

Retail/wholesale/
 ecommerce

5%

Communications/
 telecoms/media



Introduction

The crucial impact of
 modern EX strategies

The importance
 of supporting
 hybrid working

Cloud-based
 models and
 security

Investing
 in mobility

The convergence and
 strategic alignment
 of EX and CX

Conclusion
 and next steps

About the
 research

About us



1,442 participants

25 countries

5 regions

CX/EX decision-makers and influencers in a range of business roles

Americas | 275

- USA = 145
- Brazil = 76
- Canada = 54

MEA | 139

- South Africa = 78
- United Arab Emirates = 31
- Kenya = 30

Europe | 513

- UK and Ireland = 66
- Netherlands = 63
- France = 62
- Germany = 62
- Belgium = 55
- Czech Republic = 48
- Poland = 48
- Spain = 41
- Italy = 39
- Luxembourg = 29

Asia Pacific | 381

- India = 74
- China = 55
- Hong Kong = 55
- Malaysia = 53
- Singapore = 51
- Thailand = 51
- Philippines = 42

ANZ | 134

- Australia = 100
- New Zealand = 34

Includes:

30% Operations

29% IT/IT security

15% HR/EX

8% Digital

11% CEO



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us





Research methodology

The 2023 Global Employee Experience Trends Report is based on independently sourced research data. Participants were selected via random sampling on the basis that they had a direct or indirect influence on their organization's CX and EX requirements, or decision-making authority in that regard.

The research data was gathered via an online questionnaire that ran in April 2023. Research was conducted for NTT DATA by Jigsaw Research, an international strategic-insight agency with an exclusively senior team.

Data integrity, validation and analysis were performed by NTT DATA's specialist in-house Primary Research and Benchmarking Team in conjunction with Jigsaw Research. Data and outliers were validated in accordance with standard research industry rules, disciplines and best-practice approaches. The data is presented at a 95% confidence level with a 3% margin of error.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Top performers and underperformers: assessment criteria

From the organizations whose responses were included in this report:

Top performers have been categorized as having:

- Higher revenue growth (increased by 10% or more in the past fiscal year)
- A stronger operating profit as a percentage of revenue (more than 15% in the past fiscal year)

Underperforming organizations have been categorized as having:

- Poor revenue growth (0% or less in the past fiscal year)
- A weaker operating profit as a percentage of revenue (less than 5% in the past fiscal year)

The middle of the pack is categorized as having:

- Revenue growth of up to 10% in the past fiscal year
- Operating profit as a percentage of revenue between 5% and 14.9% in the past fiscal year



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



Contributors



Amit Dhingra

Executive Vice President, Managed Network and Collaboration Services

[Connect on LinkedIn](#)



Charlie Doubek

Vice President, Managed Collaboration and Communications

[Connect on LinkedIn](#)



Marilyn Chaplin

Chief Human Resources Officer

[Connect on LinkedIn](#)



Mandi Hudson

Principal Specialist: Service/Product Offer Management

[Connect on LinkedIn](#)



Andrew McNair

Director, Research and Benchmarking

[Connect on LinkedIn](#)



Riaan Wolmarans

Insights Content Editor

[Connect on LinkedIn](#)



Aishwarya Singh

Senior Vice President, Managed Network and Collaboration Services: Strategy, Offers and Transformation

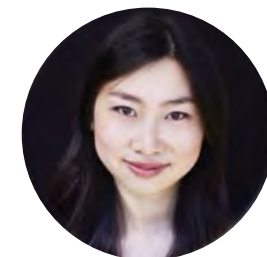
[Connect on LinkedIn](#)



Hugues Tregulier

Vice President, Product Marketing and Go-to-Market

[Connect on LinkedIn](#)



Jacqueline Chan

Product Marketing Manager

[Connect on LinkedIn](#)



Tanu Himatsingka

Senior Director, Performance Improvement and Strategic Projects

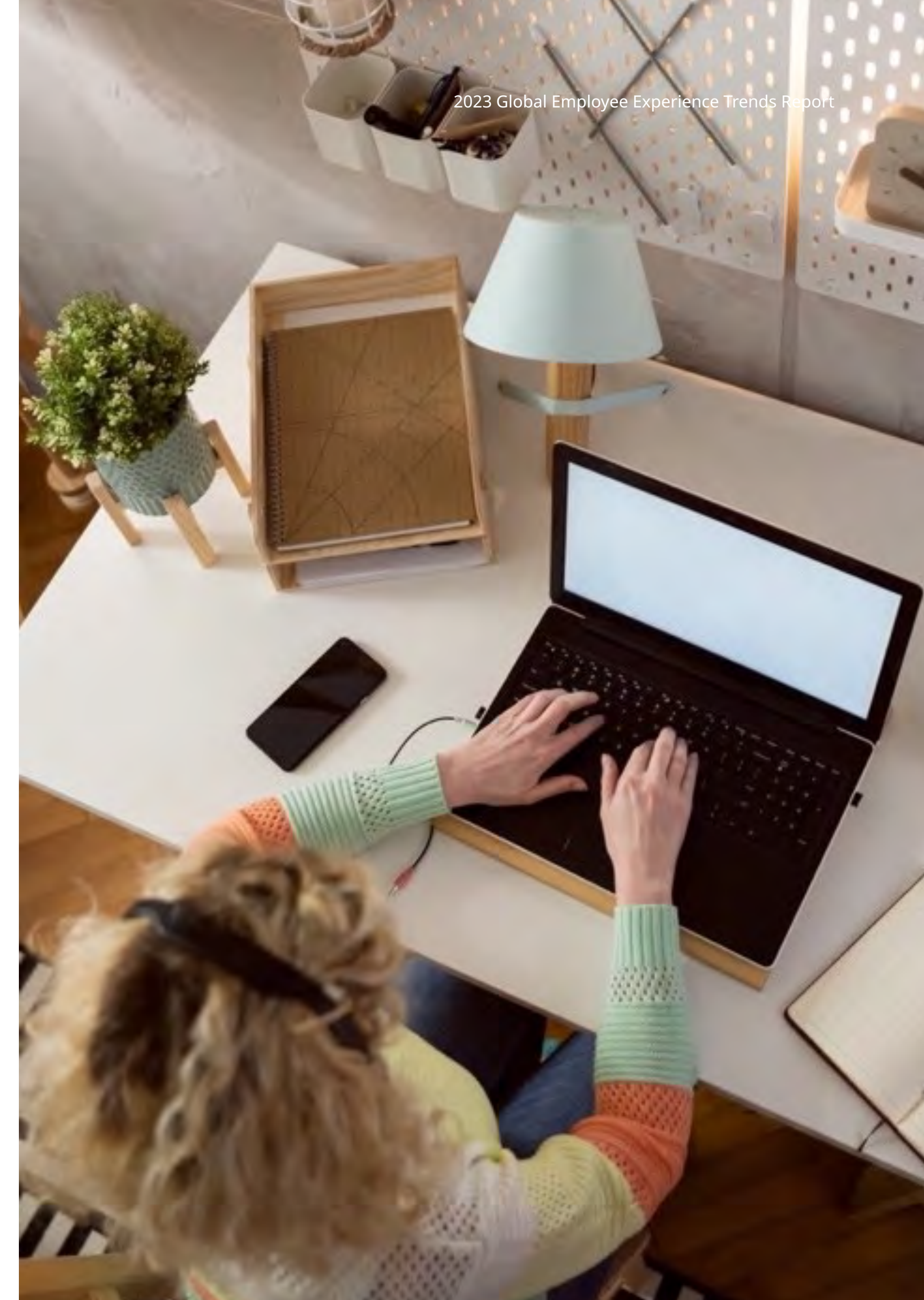
[Connect on LinkedIn](#)



Mari Labuschagne

Senior Research Analyst

[Connect on LinkedIn](#)



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

[About the research](#)

About us





About NTT Ltd. and NTT DATA

This report was published by NTT Ltd., an NTT DATA company. As part of NTT DATA, a USD 30 billion IT services provider, NTT Ltd. is a leading IT infrastructure and services company. Through technology and innovation, we deliver a secure and connected future that empowers our people, clients and communities. To help organizations achieve their business priorities, we're by their side, transforming their businesses and technology at the pace they aspire to, and driving the outcomes they want with the services they need.

As an industry leader in networks, data centers, cloud, security and managed services, as well as an innovator in private 5G, we serve 65% of the Fortune Global 500 and more than 75% of the Fortune Global 100. We also work closely with leading sports organizations, including UEFA, INDYCAR and the Tour de France. We enable a connected future.



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us
NTT DATA



List of abbreviations

- AI** artificial intelligence
- CEO** Chief Executive Officer
- CIO** Chief Information Officer
- CISO** Chief Information Security Officer
- CRM** customer relationship management
- CSAT** customer satisfaction
- CX** customer experience
- DX** digital experience
- ESAT** employee satisfaction
- EX** employee experience
- HR** human resources
- MDM** mobile device management
- NPS** Net Promoter Score
- PBX** private branch exchange
- UCaaS** unified communications as a service
- VoE** Voice of employee



Introduction

The crucial impact of modern EX strategies

The importance of supporting hybrid working

Cloud-based models and security

Investing in mobility

The convergence and strategic alignment of EX and CX

Conclusion and next steps

About the research

About us



