

# HFS Vision 2025

The New Dawn to Become a OneOffice Organization

The HFS logo consists of a white circle containing the letters "HFS" in a bold, black, sans-serif font. The background of the slide is a dark blue with a complex, glowing network of white and light blue lines, resembling a circuit board or a data network. A large, semi-transparent white circle is positioned on the right side of the slide, partially overlapping the network lines.

**HFS**



# HFS Vision 2025

The New Dawn to become a  
OneOffice Organization

Introduction





**HFS Vision 2025:**

# The New Dawn to become a OneOffice Organization

HFS sees a New Dawn emerging as the fog of 2020 eventually clears. We have no choice but to embrace this emerging business world where a perfect alignment of business outcomes and their enabling technologies demands all our focus and creativity.

New research covering 400 of the Global 2000 shows that over 60% of enterprises are not going back to the way work was done before, i.e. not returning to their pre-pandemic office-based infrastructure. We have no choice but to steer our enterprises to be competitive in this work-from-anywhere environment.

We have no choice but to develop our employees' digital fluency to embrace change and better anticipate our customers' critical needs. We have no choice but to collapse legacy corporate silos to align our customers, employees, and partners as "OneOffice," which can create outcome-oriented process chains that function in the Cloud. The choice we do have is how to get it done.

**We all have to focus solely on what our customers “have-to-have”**

The market forces of 2020 quickly forced enterprises to deliver competitive products and services that are critical to their customers. Anything “nice to have” quickly got put on the backburner as enterprises strove to focus on investing only in areas that would help them to be successful in this radically altered environment.

2021 will see the emergence of a business environment where data dominates business strategy and automation becomes a native competency, ensuring processes run effectively in the cloud to achieve business outcomes that drive growth. AI will emerge as an orchestration capability across these fluid processes as effective digital businesses deliver their products and services much faster, cheaper, and more competitively than they could ever have dreamed of pre-pandemic.



**Transformed business will deliver faster, cheaper, smarter—more competitively than they ever could have dreamed**

We have an unprecedented, once-in-an-era opportunity to make rapid, fundamental changes to the way we design and run our businesses. This opportunity forces us to rethink our skillsets, our careers, and the places where we work. This is a time to revisit those values important to us and to challenge our appetite for learning new techniques and ways of conducting business.

Unlike recessions, the current pandemic is rooted in a health crisis, disrupting supply chains and causing far-reaching, unexpected economic repercussions—steering us to a “judgement day” scenario where we have some critical choices to make for our organizations and ourselves. Data explosion, digital disruption, and customer experience emerged as the three most important drivers impacting businesses over the last 10 years.

## **We flirted with possibilities in the recent past, but mostly failed to become digitally-fluent organizations**

As we entered the 2020 pandemic environment, extensive research of Global 2000 organizations revealed only 30% enterprises have scaled-up cloud initiatives and less than 20% have industrialized automation, analytics, and AI initiatives. Less than 10% have an enterprise-wide approach to using emerging technologies. The talent question remains largely unresolved—business and IT leaders have failed to work together to become digitally fluent, aligning real business context with technological capability.

We were dominated by everything

“digital,” but now this is consigned to the past as the whole business-technology paradigm has been stripped to its brass tacks. The last decade was dominated by the *potential* of technology to change (disrupt) business models; however, as economic prosperity increased, any burning platform to inspire business leaders to make fundamental changes dissipated, and many businesses wallowed in complacency.

We learned about the possibilities of digital technologies, automation, and AI, but few companies did more than trial them with low-risk business activities.

## **We must burn our legacy bridges if we are to survive**

We want “transformation,” but we are still in the rat race to become slightly cheaper and a little bit faster. While the promise of emerging technologies has captured the C-suite’s attention, let’s be honest, we are facing a transformation fatigue stuck in the old analogous world submerged in process debt and legacy thinking. We need to change but are trapped with legacy dragons and cultural silos. The C-suite has grown impatient, operational leaders are frustrated, and the middle management is exhausted.

Covid-19 flipped the endemic, decades-old, corporate mindset of resisting change to one of demanding change overnight. Business resiliency became the lifeline in the quicksand of just focusing on cheaper/faster efficiency.



## A new dawn

What we need now is the emergence of dynamic digital organizations where people are energized by technology, where they plug into business experiences that are progressing rapidly to places where the possibilities are limitless, where the future is dawning before our eyes. What we have experienced, inside of a single year, is the coming together of people to confront their fear of change to face the reality that their organization will

sink without it—and they will be on that ship.

We are the dawn of the OneOffice Organization with the advent of connected, global talent and the infinite possibilities of intelligent, automated processes and data running in the cloud. The OneOffice state—connecting the front, middle, and back offices to create a touchless and frictionless digital

experience—is no longer a pipe dream. Almost overnight, OneOffice has become the “have-to-have” business environment to operate and compete effectively in this virtual, pandemic economy and beyond.

The HFS 2025 Vision represents the north star for bold enterprises who want to design their organizations to thrive in this new era and not meet a painful, boring, and irrelevant death.

### Exhibit 1. HFS 2025 Vision: Five fundamentals of the OneOffice Organization





# Towards HFS 2025 | PRINCIPLE

Connect the front, middle, and back offices  
to deliver the “OneOffice Organization”




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## Towards HFS 2025 | PRINCIPAL

# Connect the front, middle, and back offices to deliver the “OneOffice Organization”

Digital is the only language operations must understand. In a OneOffice organization ([see Exhibit 2](#)), automation becomes a native competency, where human performance is augmented by unleashing creativity and personal interaction, and where the immediacy of data creates insights to support decision-making that can make or break the firm.

In fact, if you can't operate your organization as one integrated unit, where data flows freely back and forth across your process chains throughout the organization, then you probably won't survive much longer in today's brutal pandemic economy.



**HFS found overwhelming resonance with the OneOffice concept. Nearly 97% C-suite executives aspire to achieve a OneOffice organization.**

**252 C-level executives across global 2000 enterprises, HFS Research 2020**



Our OneOffice model is the foundation of the “virtual workforce,” where automation tools augment the employee’s digital capabilities and the workplace becomes a “plug-and-play,” work-from-anywhere scenario. It is all about creating touchless, frictionless, digital experiences and connecting the front and back offices to facilitate them within a remote, virtual setting.

OneOffice focuses on human experiences to unleash talent and drive business results. At its core, OneOffice is about making customer, employee, and partner experiences the heart of the strategy. Human connections generate satisfaction and loyalty, and by aligning goals and experiences across stakeholders, you will collectively contribute to the organization’s purpose and create positive impacts for business growth and success.



## Exhibit 2. The OneOffice Organization





# Towards HFS 2025 | TALENT

Align employees to customers with experience and skills



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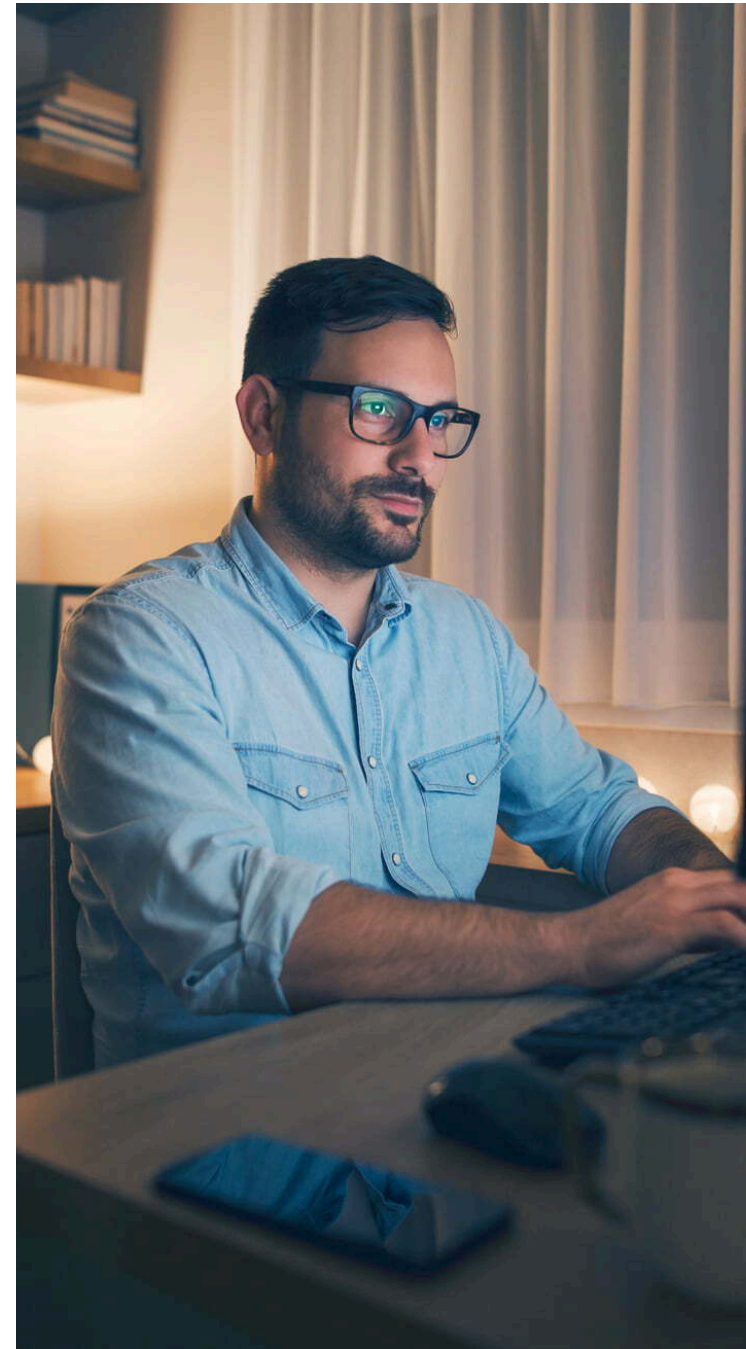
## Towards HFS 2025 | TALENT

# Align employees to customers with experience and skills

Today's organizations aspire to balance strategic agility with operational excellence. The same holds true for talent strategies and the ability to nurture skills that balance dynamic change with stability. Getting the balance right requires an investment in talent to take your workforce from where they are today to where you need them to go.

We have to look at a core sets of skills—and new applications of existing skills—in the context of an integrated organization, a new digital reality, and the speed and pace of change ([see Exhibit 3](#)).

Companies that thrive in the post-pandemic environment will build enduring relationships through virtual channels and compete on experience. But you can't compete if your employees are not skilled and empowered across the organization to drive creative solutions and respond to customer needs.





## Exhibit 3. Skills driving the OneOffice Organization

	<b>Appetite for Change</b> Readiness and ability to embrace change
	<b>Digital Fluency</b> Ability to drive interplay between business and technology
	<b>Initiative</b> Readiness and ability to self-direct, self-motivate, and turn ideas into action
	<b>Interaction</b> The ability to constructively navigate feelings and approaches with oneself and others
	<b>Problem-solving</b> The thinking and processes behind finding solutions to difficult or complex objectives
	<b>Social Influence</b> Having an impact on others in the organisation, and displaying energy and leadership
	<b>Values</b> Guiding principles in attitudes and actions
Source: HFS Research 2020	

The core attributes of OneOffice are correlated to the categories of skills and mindsets that drive business outcomes. For example, the interplay between business and IT is critical in a OneOffice organization, and both functions must be able to navigate the environment with digital fluency. Digital fluency provides business with a better understanding of how technology and digital tools can drive value. Likewise, digital fluency provides IT with the ability to understand the business application of technology and use it as an accelerant to growth.

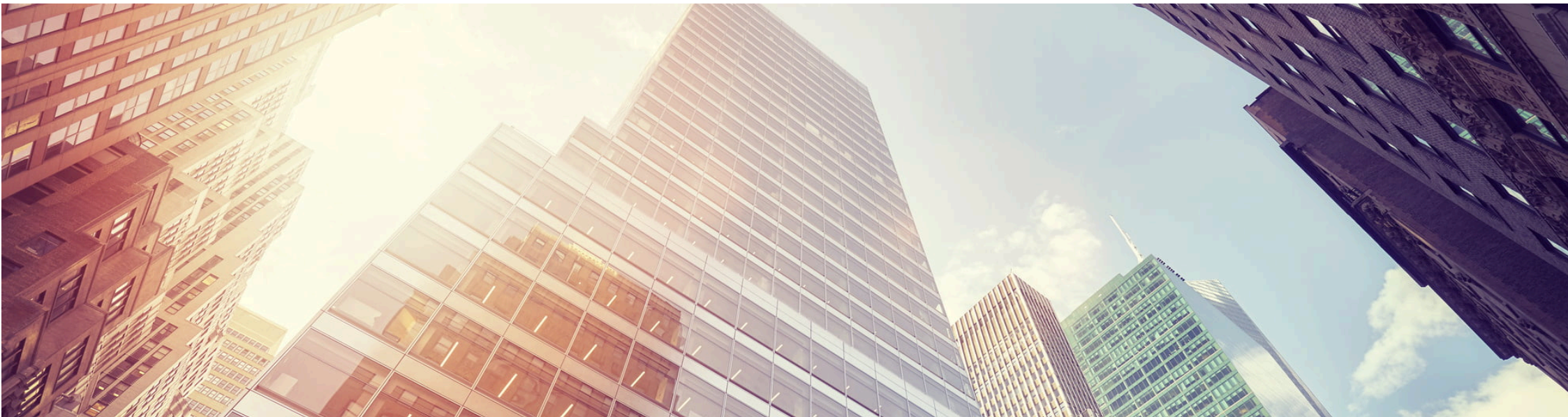
Skills like creativity and problem solving allow employees and organizations to break silos, drive experimentation, and use a diversity of perspectives to discover solutions. And people with an appetite for change live out the constant dynamic of strategic and responsive versatility.



“It is not the strongest or the most intelligent who will survive but those who can best manage change.”

Charles Darwin

OneOffice organizations empower employees to respond to shifting markets and anticipate changing customer needs with efficiency, fluency, and speed.





# Towards HFS 2025 | ARCHITECTURE

Slay your legacy dragons to go “straight-to-digital” with an integrated enterprise technology platform



## Towards HFS 2025 | ARCHITECTURE

# Slay your legacy dragons to go “straight-to-digital” with an integrated enterprise technology platform



The uncomfortable corporate truth these days is that most organizations have created a patchwork of technologies to fix broken processes, leading to a disinclined extension of legacy technologies. Change and scale resistant, such a patchwork combined with legacy technologies are often the anchors that restrict your business growth.

Achieving a OneOffice environment requires systems of experience, productivity, trust, and intelligence built into the enterprise architecture that

spans across the traditional IT stack of infrastructure, data management, and transaction management.

The new world is engineered around experience and requires us to build AI-powered, cloud-enabled autonomous solutions that focus on customer, employee, and partner experience.

Post-pandemic, we will need to aggressively adopt cloud technology to drive enterprise re-platforming versus simply focusing on virtualization.

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**88% of C-level executives agree that Cloud migrations have become an absolute necessity in the post-pandemic shock. It's time to stop talking “on-premise”**

150 C-level executives across global 2000 enterprises, HFS Research 2020

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Automation and other technologies become embedded in the experience.

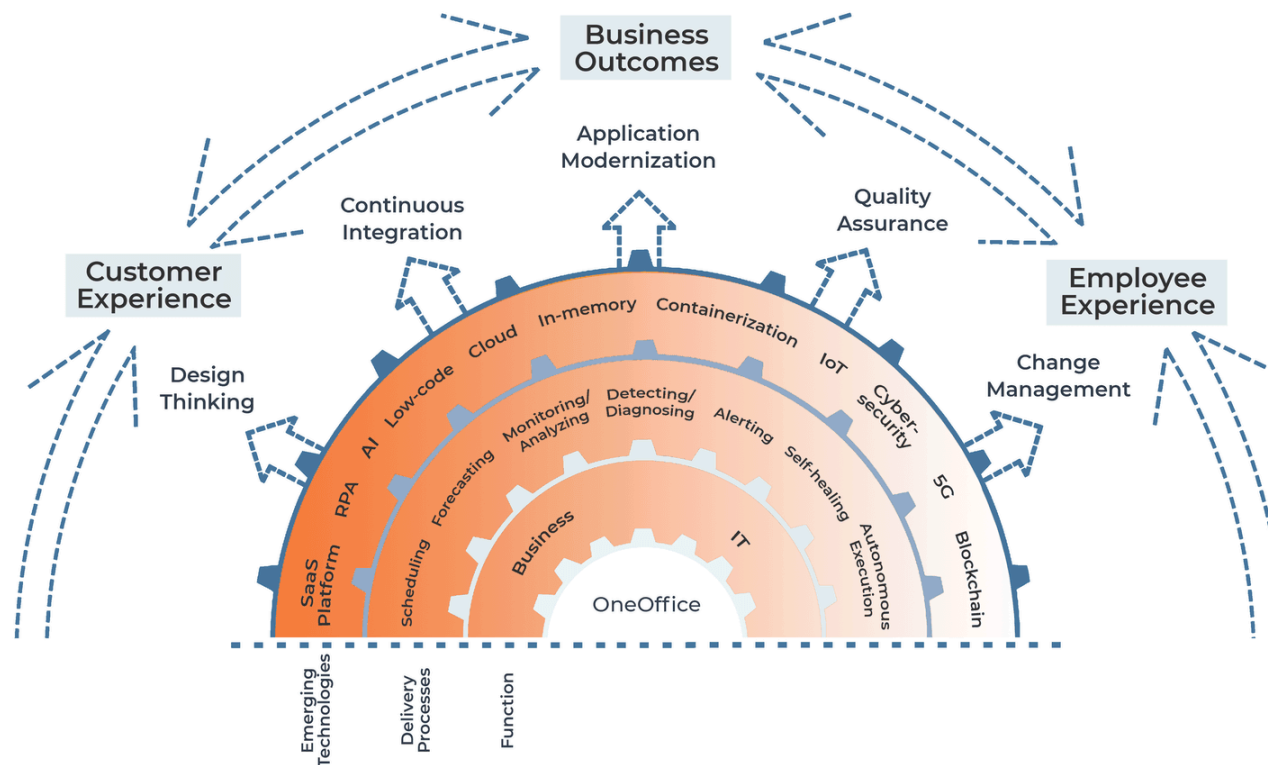


AI-powered and cloud-enabled processes should become the foundation of most technology initiatives, so we can move beyond piecemeal automation toward more autonomous solutions such as touchless invoicing or claims processing. We also need a technology backbone that delivers trust, transparency, and governance; this is where emerging technologies such as blockchain hold promise.

#### Exhibit 4: Driving the IT Services discussion back to outcomes

Imagine the possibilities from digitizing your data and seamlessly using it across multiple AI, automation, and other technologies. A combined use of emerging technologies is significantly more beneficial than using any of the technologies in isolation.

The power of "built-in" is greater than the power of "bolt-on," to break from the patchwork and move towards and *integrated* future. An enterprise architecture also requires a strong IT-business partnership at its core (See Exhibit 4).

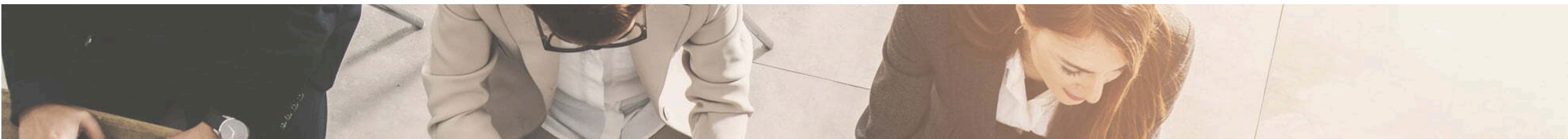




# Towards HFS 2025 | TENETS

Expand the traditional “people, process, and technology” paradigm to include data and change management





## **Towards HFS 2025 | TENETS**

# Expand the traditional “people, process, and technology” paradigm to include data and change management

### **Invest in people diversity**

Let's get serious about people diversity, maximize the potential of every person, and drive real innovation. “Technological and social changes continue to alter the landscape in every industry. Organizations will need the human judgment, empathy, passion and creativity of all their people to realize the full promise of the era's new technologies.<sup>1</sup>”

To date, technology has primarily been described as a tool, but technology is truly a functioning member of the team. Automation is not about replacing people, it is about directing the digital workforce to do the heavy lifting while enabling people to deliver on value. The transition to harnessing digital and human talent requires a massively different style of leadership to make sure the human element can meet or exceed the standard performance in a new environment.

### **Eliminate process debt**

In addition, there is a need for extreme ideas (the "x" factor) to eliminate the process debt of wasteful activities that plague Global 2000 enterprises. We need to simulate processes and reimagine existing ones with the goal of continuous process monitoring versus running after cheaper and faster.

<sup>1</sup>Matt Bush, *Great Places to Work, Why is Diversity & Inclusion in the Workplace Important?*, August 2020

## Exhibit 5. Five tenets required to achieve the OneOffice experience



### Focus on experience

We also cannot let technology or hyped disruptions overpower the narrative. We need to focus on technologies that innovate the operating model and support the dimension of experience. Automate smarter, test and expand digital offerings, and invest in your people to make it happen.

### Make data a first-class citizen

We need new approaches, different sources of data, open data marketplaces, and the ability to discover new datasets that reside beyond organizational silos. Organizations must also think beyond simply moving data between platforms and, instead, employing technology to easily unite data and dynamically and intelligently harmonize it.

Treat data like an asset rather than letting it be the exhaust of automation.

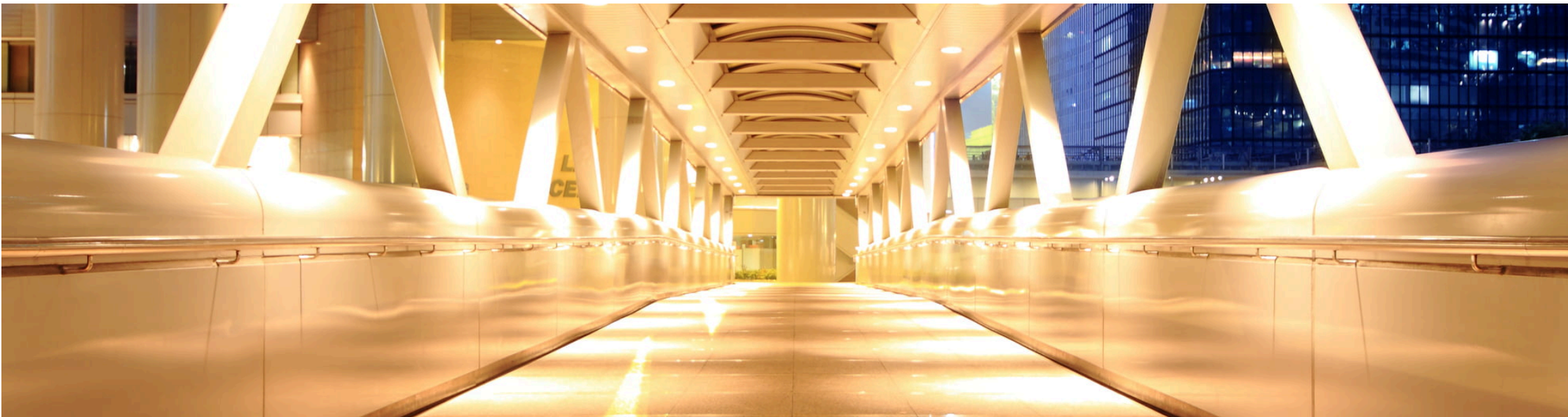


**Success is determined by change management**

Success will not be determined by the rate of digital adoption but by the effectiveness of change management and the ability to change behaviors at scale. We all want digital acceleration and improved business results, but we just don't know how to go about changing our policies, processes, talent, and tech-readiness. Change management needs to be built-in, not added-on.

Culture, commitment, talent, business case, and data are the top 5 challenges in emerging technology adoption

600 senior executives across global 2000 enterprises, HFS Research 2020





# Towards HFS 2025 | STRATEGY

Collaborate not just internally but also  
externally to achieve OneOffice value





## Towards HFS 2025 | STRATEGY

# Collaborate not just internally but also externally to achieve OneOffice value

HFS believes that as organizational silos converge, ecosystems will start to emerge ([See Exhibit 6](#)). We are at the dawn of a hyperconnected economy where ecosystems driven by collaboration across multiple organizations with common objectives will drive completely new sources of value for enterprises.

The potential value generated by an ecosystem will be exponentially higher than what can be achieved as a single organization.

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**95% of C-level executives agree that the potential value generated by an ecosystem will be exponentially higher than what can be achieved as a single organization**

150 C-level executives across global 2000 enterprises, HFS Research 2020

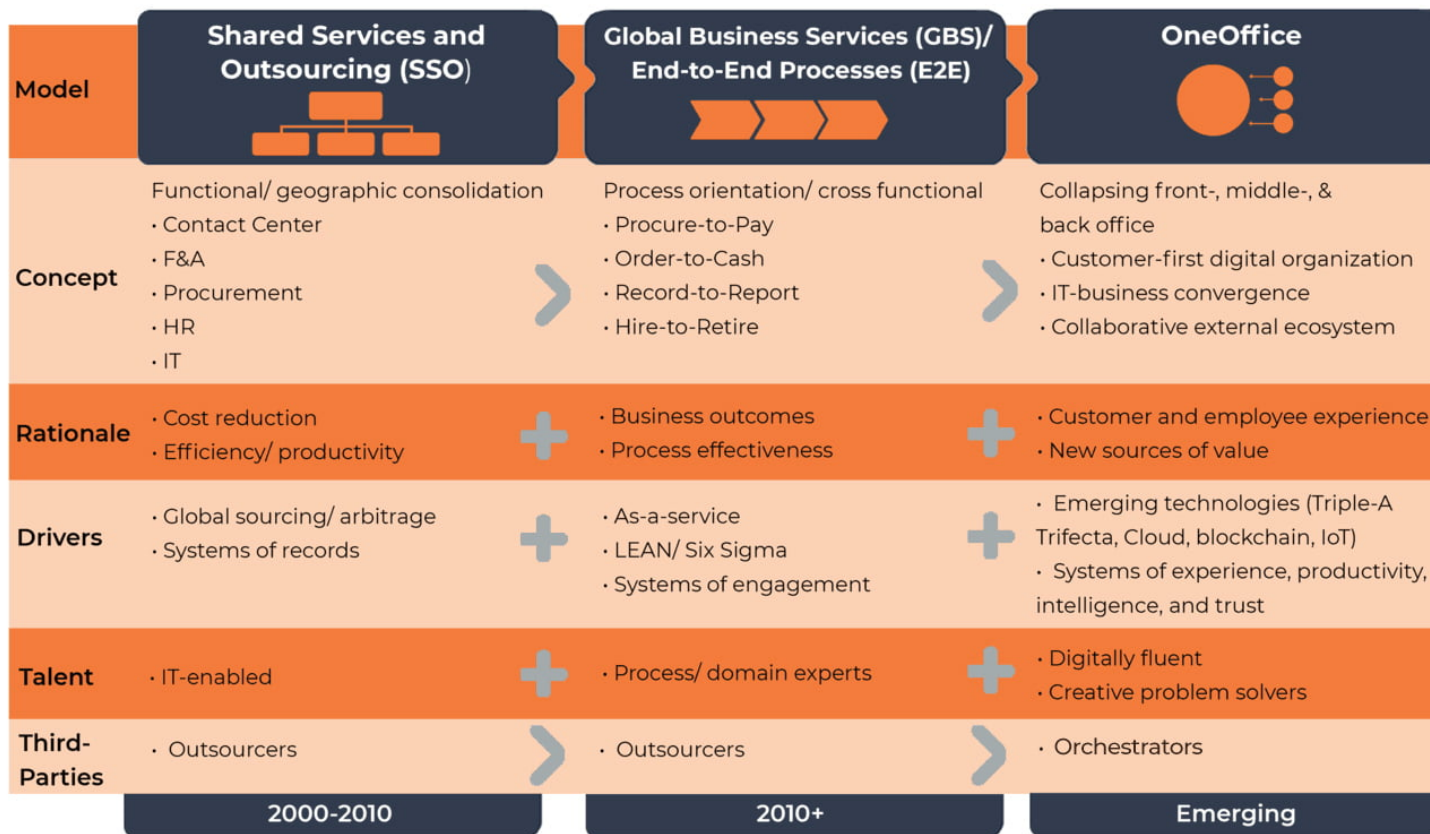
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Organizations will need to collaborate across industries if they want to pinpoint where disruption is coming from, where to disrupt, and how to keep reinventing themselves. They should ensure all employees, customers, partners, and suppliers are considering these future ecosystems in the solutions they develop.

The current global crisis intensifies the need for businesses to cooperate with each other more broadly and develop new models for non-linear growth. Emerging technologies are starting to make this vision of a shared economy with distributed and trustworthy information a reality.



## Exhibit 6. Dawn of the OneOffice Organization



In an environment where the need for business resilience is driving a focus on change, organizations have a unique opportunity to reshape themselves for the decades to come. This opportunity forces us to rethink our skillsets, our careers, and the places where we work. This is a time to revisit those values important to us and to challenge our appetite for learning new techniques and ways of conducting business.

### A new dawn is emerging.

How you shape the future of your business—not when—is the imperative facing business leaders today.



A nighttime photograph of a city skyline featuring several modern skyscrapers. The buildings are illuminated with blue and white lights, creating a vibrant urban scene. The sky is dark blue, and the lights from the buildings reflect on the surrounding surfaces.

# HFS Research

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# HFS Research

## Insight. Inspiration. Impact.

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A MONTH

- HFS is a unique analyst organization: We combine deep expertise with rapid, demand-side analysis of the Global 2000 to create a visionary narrative on the interplay between business operations and technology. We provide tailored, innovative insights to help you solve problems, make critical decisions, and realize long-term value on your journey to the new.

- The HFS OneOffice Organization is our vision for aligning business operations to customer, partner, and workforce interactions across an adaptive, digital environment. Our analysts provide insight into emerging skillsets and major innovations powering the OneOffice Organization, including Automation, Artificial Intelligence, Cloud, Digital Business Models, and Smart Analytics.

- HFS analysts are respected for their industry knowledge and no-nonsense insights, informed by demand side data and engagements with industry practitioners. Our bi-annual HFS OneOffice pulse study tracks demand trends over time across industry domains, horizontal services and technologies, so we always have our finger on the pulse of the market.

We are proud to have introduced the widely acclaimed concepts to the market, such as "RPA" (Robotic Process Automation) in 2012, Digital OneOffice in 2016 and the "Triple A" (Automation, AI, and Analytics) in 2018.



**Thank you for reading**

HFS Vision 2025: A  
New Dawn for Bold  
Enterprises to  
embrace  
OneOffice