

451 Research's

# 2022 Research Agenda

Key topics, coverage and planned deliverables



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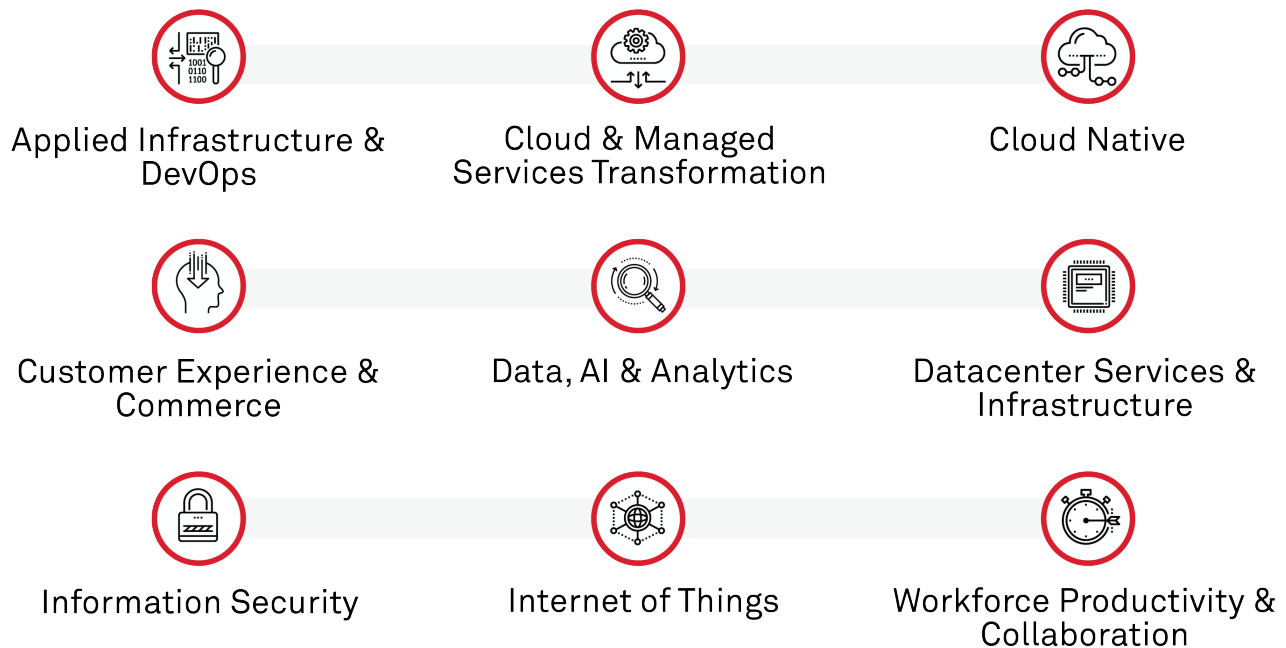
**S&P Global**

Market Intelligence

# Your radar into **market disruption, innovation and digital transformation** in the IT space.

451 Research, a technology research group within S&P Global Market Intelligence, provides a holistic view of innovation across the entire enterprise IT landscape through a combination of expert analyst insight, backed by differentiated data. Our analysts interact with key industry decision-makers every day to deliver the essential intelligence necessary to understand the pivotal role that digital transformation is playing in reshaping our world.

Our research spans nine channels that align with the prevailing issues driving IT innovation, helping clients implement, invent and invest in digital transformation. The research agenda for each channel outlines key topics, analyst coverage and planned deliverables to support our clients' critical business decisions. The pace and extent of this transformation means that many trends span multiple channels; our research approach encourages analyst collaboration both within and between channels, allowing us to surface emerging trends before anyone else. Additionally, for a higher-level perspective on the key trends that will drive digital transformation in 2022 at a strategic level, please refer to our latest [Big Picture report](#).



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# Workforce Productivity and Collaboration

The pandemic has fundamentally and permanently changed the way we work, creating enormous space for innovation across every aspect of the employee experience. What's more, workplace technologies have a clear and growing influence not just on employee productivity, but on other corporate goals such as operational agility, business resilience, talent recruitment and retention, and overall employee engagement. There has never been more innovation here, as businesses grapple with a new cultural, operational and technological landscape.



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# Key Research Topics and Themes for 2022

## **The maturing of employee experience (EX) strategies**

2020 and 2021 were marked by huge disruption, with companies scrambling to support remote and hybrid work models, address issues raised by social justice movements, and adjust to a more turbulent talent market. In 2022, these stresses will require businesses to rethink their EX strategies, focusing on more material efforts and investments to drive employees' engagement, satisfy their aspirations and support the sense of belonging and purpose they are increasingly looking for at work. Businesses are looking to new workforce strategies and technologies to help them with this reframing.

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## **A new era of immersive productivity will shape the future of SaaS**

A radical rethinking of employees' software is beginning as more visually engaging experiences are taking hold. Going beyond basic conversation, task management and workflow automation, the leading edge of SaaS applications is aggregating important context, high-value collaboration and coordination around business goals. As users become accustomed to more seamless and integrated software experiences, this is set to have a foundational impact on the design of the next era of SaaS applications. For many vendors, this will impact their product design, market positioning, technology partnerships and channel relationships.

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## **The changing focus and investments of the HR department**

Over the past few years, the human resources function has evolved into a more strategic business partner for organizations, as market dynamics and needs around HR-specific software and technology tools have changed. Core HR tools for processes including payroll, benefits and workforce management are still essential. But HR buyers are also maturing their investments in the employee experience and across the employee lifecycle in areas such as employee engagement, learning and development, and performance management. At the same time, HR skill sets are becoming more data-driven and focused on optimizing the processes under its control. Meanwhile, the mass shift to remote and distributed work has introduced new challenge vectors with ripple effects that will be felt throughout the entire HR arena and will subsequently impact its buying cycle and strategy.

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## **New work hubs emerge to improve workforce coordination and engagement**

Many technology and business operations leaders and employee experience strategists are rethinking their long-term workforce technology strategies, giving more thought to the overall experience they provide users across their estate of technologies. More specifically, they are reconsidering how to integrate their different applications within that experience. Businesses are therefore rethinking what constitutes a strategic hub that can give employees a personalized view of the resources they need to coordinate work effectively, and which applications are spokes that support that coordination. This is a key macro trend that will influence the direction of a significant number of productivity and collaboration software categories.

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## **Innovation across the project, portfolio and work management categories**

Project, portfolio and work management tools are among the more dynamic productivity software categories. This remains the case with strategic M&A, product innovations, a raft of new vendors, a widening set of buyers, growing partner and channel ecosystems, and widening competition as categories overlap. This space will continue to grow in strategic importance as vendors position their offerings as a central part of knowledge workers' everyday toolkit.

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### **Businesses adopt more agile planning cycles**

Businesses no longer have the luxury of annual planning cycles. With the disruption of the past two years and ongoing turbulence in the labor market and supply chains, there are too many variables at play for organizations to plan that far into the future with any degree of certainty. Organizational agility is paramount, and it depends, in part, on a more agile and fluid planning cycle. For some businesses, a quarterly plan is sufficient, but others may need to plan month to month. As such, businesses will increasingly be looking for technologies that can help them forge connections across their divisions – as collaboration is key to increasing fluidity and agility – and provide more continuous management of their plans.

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### **The disruptive potential of CPaaS for business processes**

The rapid growth of CPaaS – a platform-based approach for real-time communications – has the potential to be highly disruptive, not just for separate categories of business communications technologies such as unified communications, but to supplement a wide range of other business processes. While key CPaaS vendors have been focused primarily on customer experience opportunities, there is a huge greenfield territory among knowledge, task and service workers whose workflows would benefit from embedded communications. The breadth of both these CX and EX use cases will continue to fuel the growth and strategic importance of CPaaS in enterprise software.

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### **ESG mandates will begin to inform workforce strategies and technology choices**

How to effectively treat environmental, social and governance (ESG) issues is shaping up to be one of the most significant business agendas of our time. There is growing bottom-up pressure from employees, as well as growing downward pressure from investors and regulators, to commit to ESG initiatives.

This pressure has intensified over the past two years, with concerns over furloughs; workplace safety; diversity, equity and inclusion (DEI); talent attrition; and operational culture. Businesses need to better reflect the breadth and significance of these and other issues in the experience they provide their employees.

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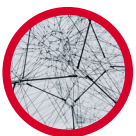
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# Our analysts engage directly with IT industry leaders to **understand current market dynamics.**



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Produced daily by our global team of expert analysts, our Market Insight reports provide the critical analysis, insight and data you need to stay informed and competitive on the markets, players and issues you care about, in a highly consumable format.

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**Briefing-driven analysis of a specific vendor**, covering the impact its business model, services, technologies and go-to-market strategy will have on the market. A company SWOT analysis is included in every report.

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## Technology & Business Insight >

Designed to complement our Market Insight service, Technology & Business Insight are longer-form reports that offer a comprehensive view of the dynamics impacting specific technology markets and sectors, showcasing a broader view where technologies are disrupting and impacting multiple market segments or within a key ecosystem.

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