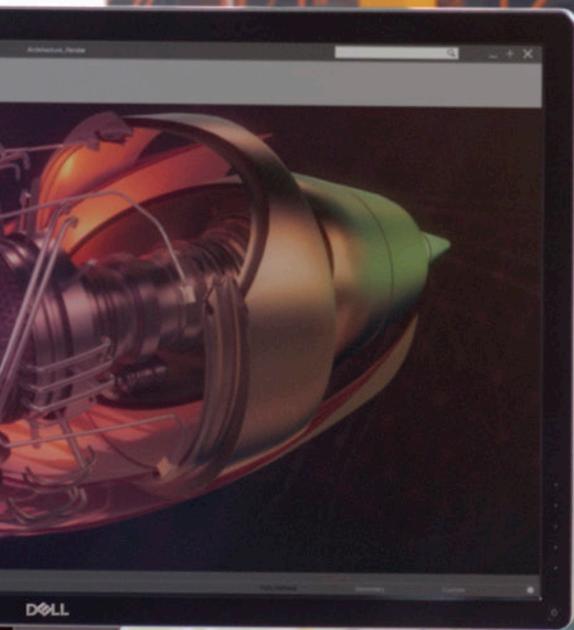




The Manufacturing Logistics & Retail Workers' Experience

Survey reveals the importance of
technology to spur productivity,
motivation and engagement for
Manufacturing Logistics &
Retail workers



In the Manufacturing Logistics & Retail (ML&R) industry, innovation is rampant amid companies that are highly integrated and interdependent. Whether in product design, manufacturing methods and materials, inventory management or product delivery, digital transformation is enabling businesses to raise their game. In the race for industry leadership, ML&R companies require a skilled, motivated, engaged and effective workforce that can enhance their competitiveness across three vectors:

- **Productivity.** Faced with tough competitors and tight profit margins, ML&R companies require all workers to operate at the highest level of productivity.
- **Collaboration.** From product design through production, inventory and distribution, workers must communicate lots of information rapidly and often with one another to optimize processes.
- **Security.** Protection of intellectual property, inventory documentation and customer service records is critical, particularly in the era of regulations such as the European Union's General Data Protection Regulation (GDPR).

Because ML&R workers use many types of technology as they carry out their different roles, their motivation and engagement depend on their using the right technology for their various needs. Substandard technology is likely to erode organizational effectiveness as well as worker morale. According to a new survey:

- 68% say technology can help create a good work-life balance, making them motivated and engaged.
- 66% prefer to work for an organization that offers mobility and flexibility.
- 60% say freezes, bugs and glitches negatively affect motivation and engagement.

ML&R technology decision-makers must provide devices and equipment to enable productivity, collaboration and security for all workers across four basic persona types:

- **Desk-centric workers:** Primarily office-based and at a desk. These include executives, administrators, product designers, materials buyers, shipping managers and accountants.
- **Corridor warriors:** Frequently mobile within a building. These workers include manufacturing supervisors, retail salespeople, airport and harbor personnel, and others who might move among offices, within a warehouse, or across a factory floor.
- **Remote workers:** Primarily at a distant location. These workers could work in a desk-centric mode from a remote warehouse or manufacturing site, and include auditors, consultants, OEM partners and on-site customer support personnel.
- **On-the-go pros:** Primarily mobile, either locally, regionally or internationally. These workers include executives, salespersons, purchasers, quality-control engineers, pilots, drivers, nautical personnel and other delivery professionals.



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Although a worker's persona reflects his or her primary work style, many members of one persona group might have secondary characteristics of another group. For example, a product designer might be primarily desk-centric, but could be equipped with a laptop for occasional mobile work. Similarly, an on-the-go pro such as a salesperson could also spend a certain amount of time working at a desk in a remote office.

The Survey

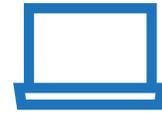
To better understand the experience of workers in the ML&R industry, Dell commissioned a survey across five global regions that explores the importance of technology to the overall effectiveness of ML&R workforces, for productivity, collaboration and security. The survey findings point to these general conclusions:

1. Worker motivation and engagement are keys to productivity.
2. Substandard or inappropriate technology impedes workforce effectiveness.
3. Every worker's technology needs are different.
4. Security is important but must not thwart workers' ability to access data and applications.
5. It is essential to provide each worker with a complete technology ecosystem.

Key findings

In the field of ML&R, personal productivity is paramount. As noted in the results above, workers with very diverse roles and tasks at ML&R organizations value technology as a productivity enabler. Poor technology performance negatively affects their engagement.

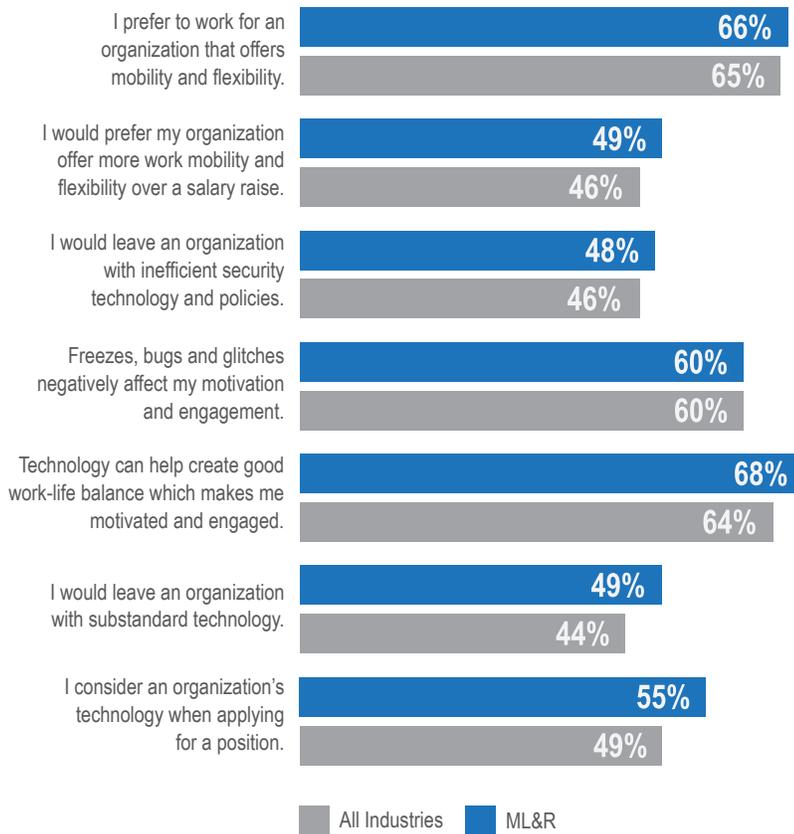
The responses of workers in the ML&R industry correspond in general to those of workers in all industries, although the responses of ML&R workers are more pronounced.



**Substandard or
inappropriate
technology
impedes workforce
effectiveness.**



Please indicate to what extent you agree with the following statements about technology and your employment.



66% say they prefer to work for an organization that offers mobility and flexibility.

These findings are important, considering technology is instrumental for nearly all tasks, ranging from powerful workstations for product design to rugged tablets for the delivery of finished goods to customers. ML&R workers at every level are likely to be very discerning with regard to the technology they use, and failure to provide the best technology could drive those workers elsewhere.

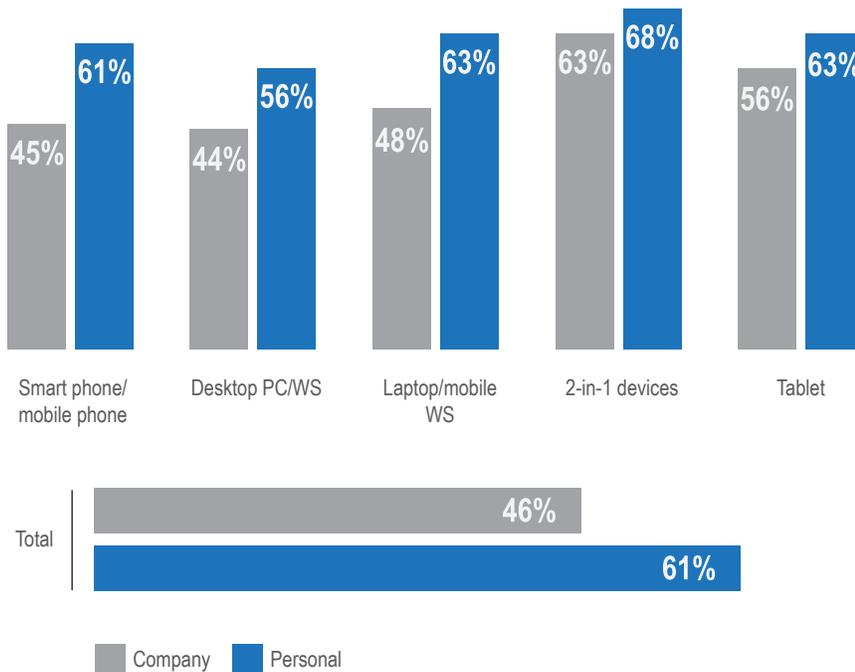


Personal devices are preferred

In ML&R, workers, whether in offices, on the factory floor, working remotely or on the road, are much more satisfied with their personal devices, including desktops, laptops and 2-in-1 devices, compared with company devices.

On a scale from 0-10, how satisfied are you with the devices you mentioned previously, when considering work-related activities only?

Percentage shown is very satisfied (9 or 10)



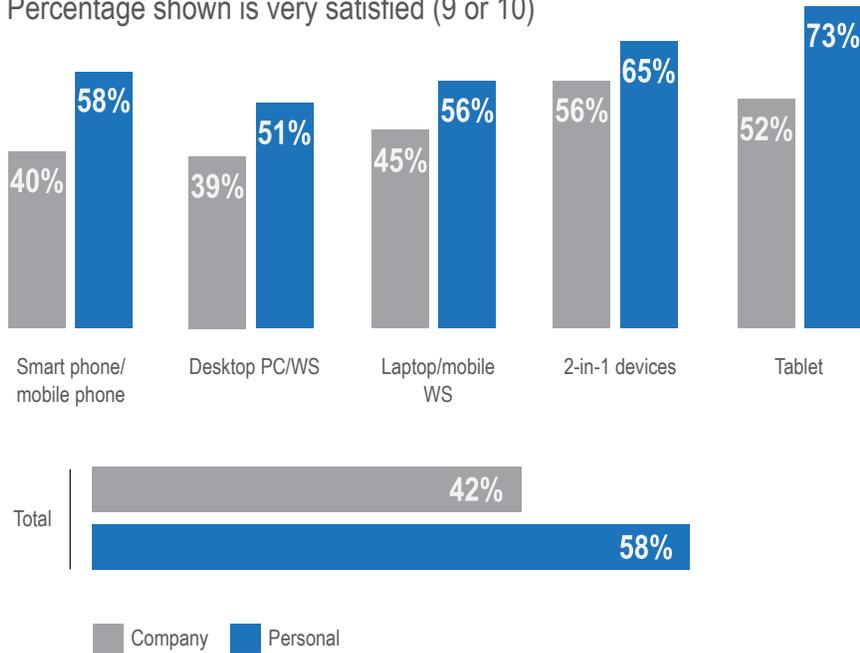
Workers are much more satisfied with their personal devices, including desktops, laptops and 2-in-1 devices, compared with company devices.

Further, they are more likely to recommend those personal devices. This finding suggests that ML&R workers understand their needs with regard to technology better than the IT decision-makers at their companies. And it suggests that IT leaders at ML&R organizations might do better at providing their demanding workforces with equipment that has greater power, enhanced capabilities or greater durability.



On a scale from 0-10, how likely would you be to recommend the following devices to your friends or family for work-related activities only?

Percentage shown is very satisfied (9 or 10)

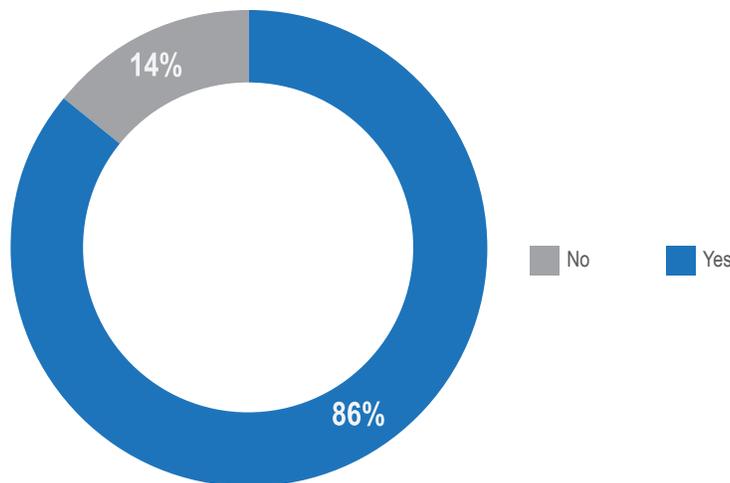


86% would prefer their organization provide them with a tested and supported ecosystem, including accessories and displays.

A tested and supported environment

Even though personal devices are favored by ML&R employees, 86% of respondents would prefer their organization provide them with a tested and supported ecosystem, including accessories and displays.

Would you prefer that your organization provide you with a tested and supported ecosystem (devices and accessories), rather than seeking out devices yourself?



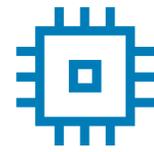
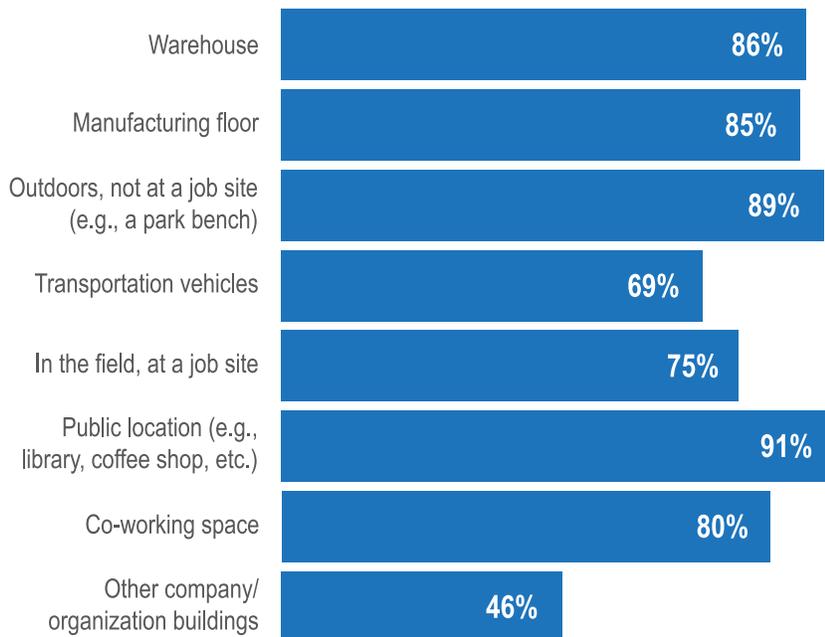
Several related survey findings point to the desire among workers to utilize advanced devices and equipment and to the positive effect of the right ecosystem on their morale and ability to get work done. In addition, the ability to use mobile devices and to work from home when needed are recognized productivity enhancers. For example:

- 65% say cutting-edge and high-performance technology would help them be more productive.
- 61% say having the right technology ecosystem improves their motivation and engagement.
- 64% say mobile devices make employees more productive.
- 61% say being able to work from home helps employees get more done.

Harsh work environments

Harsh work environments are not unusual in the ML&R industry. These environments might include factories where chemicals, dust and vibration are present. However, ML&R workers also find themselves in outdoor locations that can present challenges to equipment that is not up to the task. Heat, cold, moisture and possibly rough treatment are hazards that might test the durability of many devices and accessories.

Thinking about each work location, are you exposed to any of the following: freezing temperatures, extreme heat, dust, chemicals or explosive atmosphere (gas, detergents, oil)?



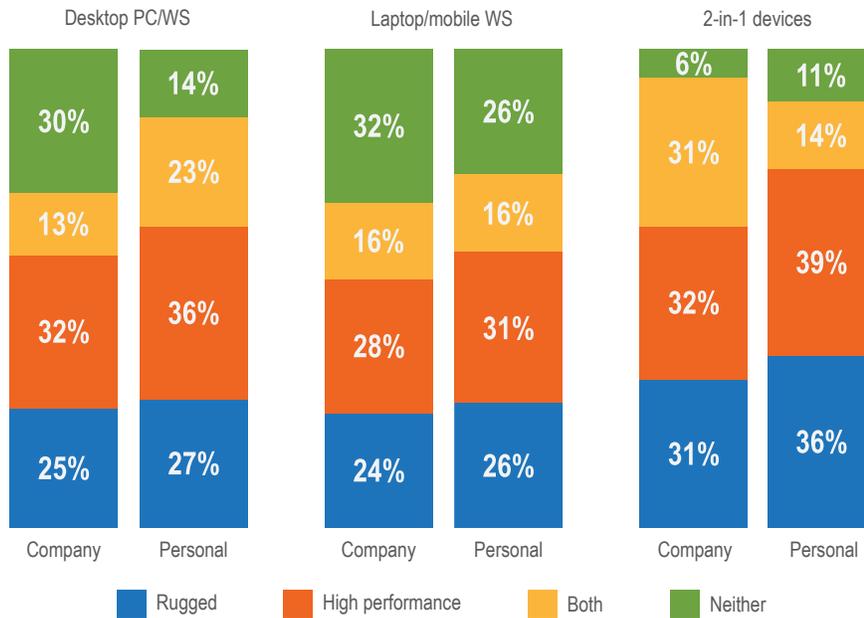
65% say cutting-edge and high-performance technology would help them be more productive.



Rugged and high-performance devices

Considering the demanding business conditions and harsh work environments of ML&R organizations, it might be expected that workers often use either rugged or high-performance devices, or both. As the percentages in the charts below indicate, such is the case.

Are any of the devices you use for work fully rugged to military standard (MIL-STD) specifications or would any be considered a high-performance workstation?

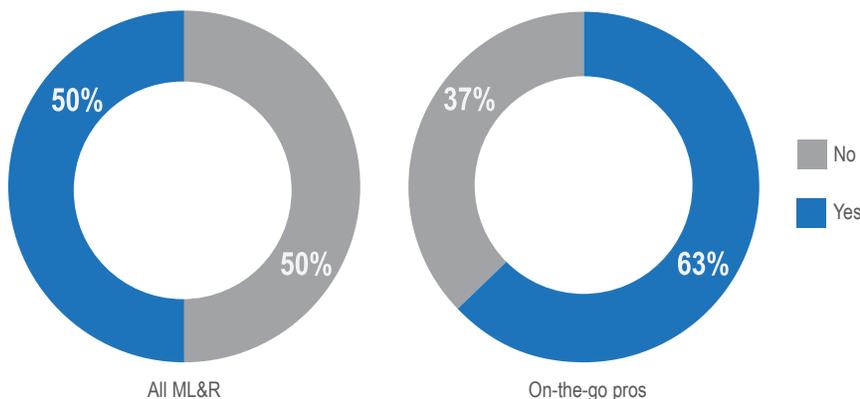


50% sometimes work outside their organization's security protocol.

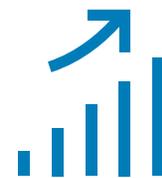
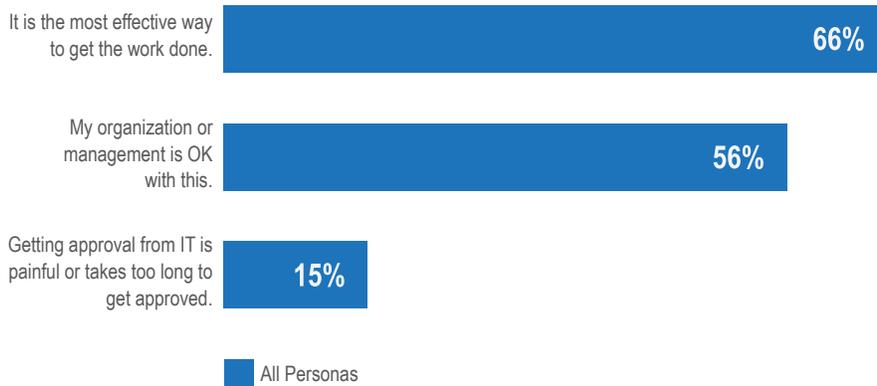
Security

Half (50%) of ML&R respondents sometimes work outside their organization's security protocol. But for on-the-go pros, the number is 63%. This is cause for concern, considering the potential sensitivity of information that might be shared – whether intellectual property, product inventory data or confidential customer information.

Do you sometimes find it necessary to work outside your organization's security protocol?



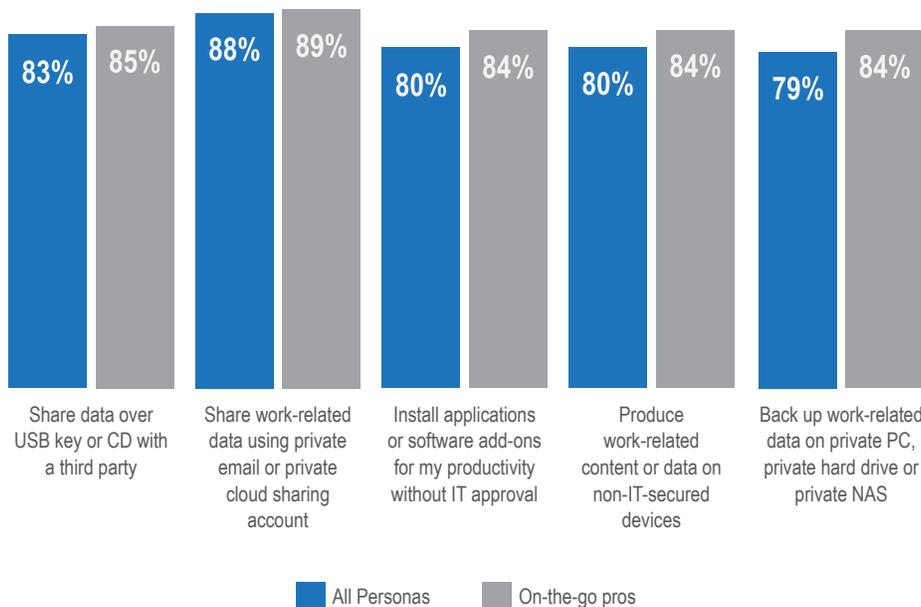
The reason is simple. Workers seek to be productive and security processes are cumbersome: 66% of all respondents say that circumventing security measures is the most effective way to get work done; 56% say management is OK with this practice.



66% of all respondents say that circumventing security measures is the most effective way to get work done.

Of those who work outside of corporate security guidelines, many take part in high-risk practices, such as sharing data over a USB key or CD with a third party. Results for all personas and for on-the-go pros are similar (see chart below).

How frequently do you typically do the following?



The right partner makes a big difference

It is important to understand and meet the unique technology needs of every ML&R worker. The right technology partner, with a complete portfolio of devices – including high-performance desktops, laptops and 2-in-1 devices – can go far to streamline hardware procurement, enabling an ML&R industry organization to efficiently meet its users' needs for motivation and engagement, and thereby its larger goals for delivering quality services to clients.

Take the first step to better understanding the needs of your digital-era workforce today.

[Download the complete “Workers’ Experience” report now.](#)

About the survey

To better understand the modern workforce and its technology needs, Dell sponsored a survey of 6,809 respondents. The survey covered five major global areas: North America, Western Europe, Japan, India and Latin America. The survey also covered seven major vertical industries: Education, Healthcare, Media & Entertainment, Technology and R&D, Finance, Manufacturing Logistics & Retail, and Energy. The survey was fielded during the summer of 2018.



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