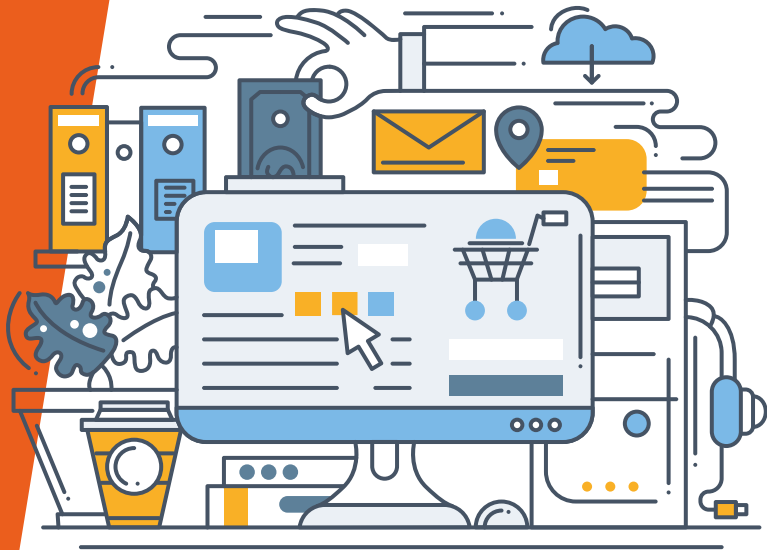


riverbed®

Rethink Possible: Visibility and Network Performance - The Pillars of Business Success.



A report from Riverbed Technology

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Executive Summary

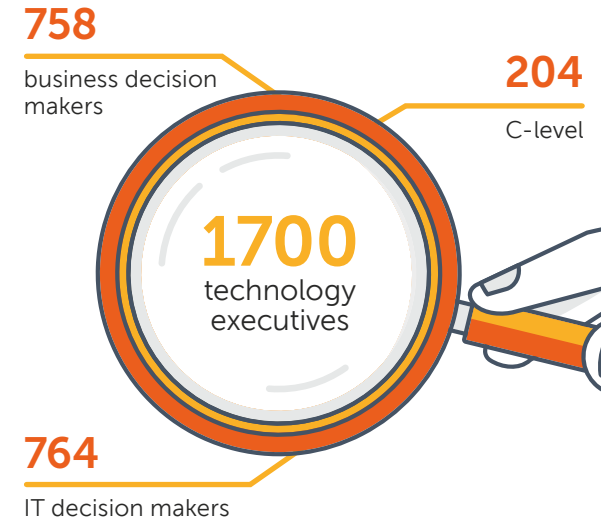
Businesses rapidly adopting technology is not a new trend. However, the challenge for many IT teams, when embarking on the quick introduction of new tech, has shifted from imagining the improvements these systems can bring, and their implementation, to the maintenance of these new systems. When development turns into a habit in this way, creative innovation often suffers first. In the digital first age, where competitive advantage is critical, diminished creativity and innovation is not an option for your business.

To understand the challenges our customers, and the market, faces in driving creativity, innovation and productivity, and provide guidance and solutions to digital enablement, Riverbed has created a report **'Rethink Possible: Visibility and Network Performance - The Pillars of Business**

Success:' It aims to shed light on the complex road to digital performance, highlighting the disconnect between the C-Suite, business leaders and IT decision makers in their pursuit for digital excellence and discussing the technology priorities that will deliver business growth.

Based on an independent survey, the study details the attitudes about innovation, productivity, human behaviour and IT capabilities held by more than 1700 technology executives, across six countries. This includes 204 C-level-, 758 business decision makers, and 764 IT decision makers.

The report uncovers that optimised network infrastructure, visibility and digital experience management is the next frontier in business success.



86%

Agree, "digital performance is increasingly critical to business growth."

84%

Enhancing the customer's digital experience is increasingly critical to long-term success

59%

Employees say they are dissatisfied with their job because of outdated technology and underinvestment.

67%

Believe that the technology their organisations use today has contributed significantly to employee churn.

It reveals that the vast majority of C-Suite, business leaders and IT decision makers (86%) agree that "digital performance is increasingly critical to business growth", and that enhancing the customer's digital experience is increasingly critical to long-term success (84%).

The report also exposes organisational disconnects and proves that digital expectations and reality do not match. Despite the clear belief that digital performance is critical to business, 67% of the respondents believe that the technology their organisations use today has contributed significantly

to employee churn, and 59% of employees say they are dissatisfied with their job because of outdated technology and underinvestment.

The bottom line is that, in 2020, technology should not hold business back. It should be empowering business and giving employers and employees a platform on which to be creative, innovative and, above all, productive. **'Rethink Possible: Visibility and Network Performance - The Pillars of Business Success.'** provides the insight and guidance you need to rethink what is possible when it comes to technology enablement.

Human behaviour: the need to accelerate creativity, innovation and productivity

Innovation and productivity are the cornerstones of successful business, and creativity lies at the heart of change. In fact, 75% of C-Suite members believe that a lack of creativity costs the economy a significant amount of money due to lost opportunity. In order to tap into creativity – to drive innovative, original ideas and productivity – we have to look at how digital experiences are affecting people. Because ultimately it is humans, and their behaviour that drive business forward – enabled by technology.

The reality, however, is that to tap into creativity, the IT team needs to be able to stop fighting fires and focus on driving real change. Business leaders need to be empowered and encouraged to

think about what is possible. And employees in your business need to be digitally enabled, and their digital experiences flawless. The need for change is so significant that 82% of C-Suite members say businesses need to rethink what is possible to survive in today's unpredictable world.

It's very likely that your businesses' digital experiences are not flawless. The good news is, you are not alone. Today, there is a gap in the perception of what is possible through technology and the reality experienced by employees, employers and customers. But this can change, and that change needs to be embraced.

75% of the C-Suite

believe that a lack of creativity costs the economy a significant amount of money due to lost opportunity



In fact, 82% of C-Suite members

say businesses need to rethink what's possible to survive in today's unpredictable world

95% of all respondents

say that innovation, breaking boundaries and rethinking what is vital or important is critical to future success



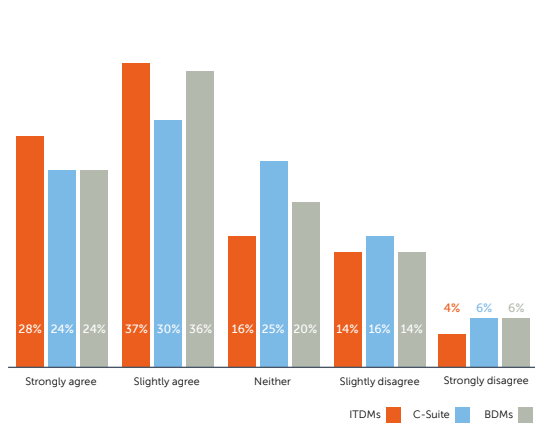
Can you identify what is holding your business back?

Tech has almost always been the answer to driving up productivity and innovation, but not everyone is ready to embrace tech or the pace of change.

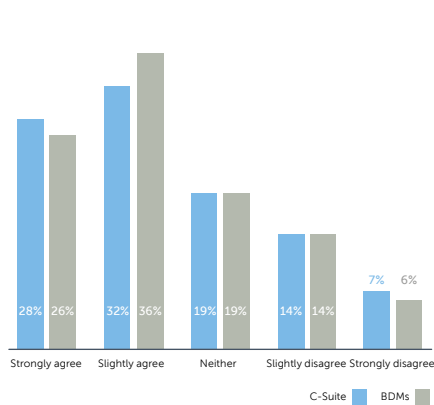
Almost two thirds of IT decision makers (65%) believe that business leaders are not prepared for the next generation of tech disruption. A sentiment that six in ten C-Suite (60%) and business decision makers (62%) agree with.

The C-Suite (60%) and business decision makers (62%) also reveal that they feel technology is changing so quickly, that they struggle to keep pace with their customers' needs. The latter of which could pose a significant risk to their business' bottom line.

To what extent do you agree or disagree with these statements?
Business leaders aren't prepared for the next generation of tech disruption.

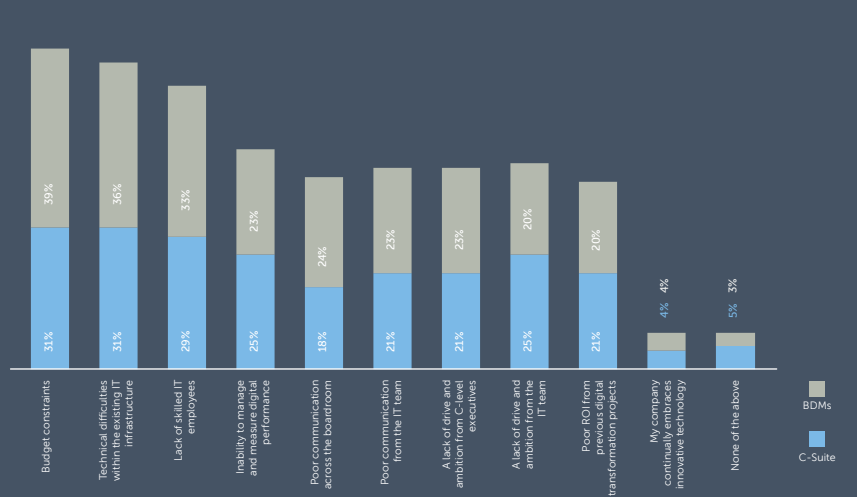


To what extent do you agree or disagree with these statements?
Technology is changing so quickly and I struggle to keep pace with my customers' needs.

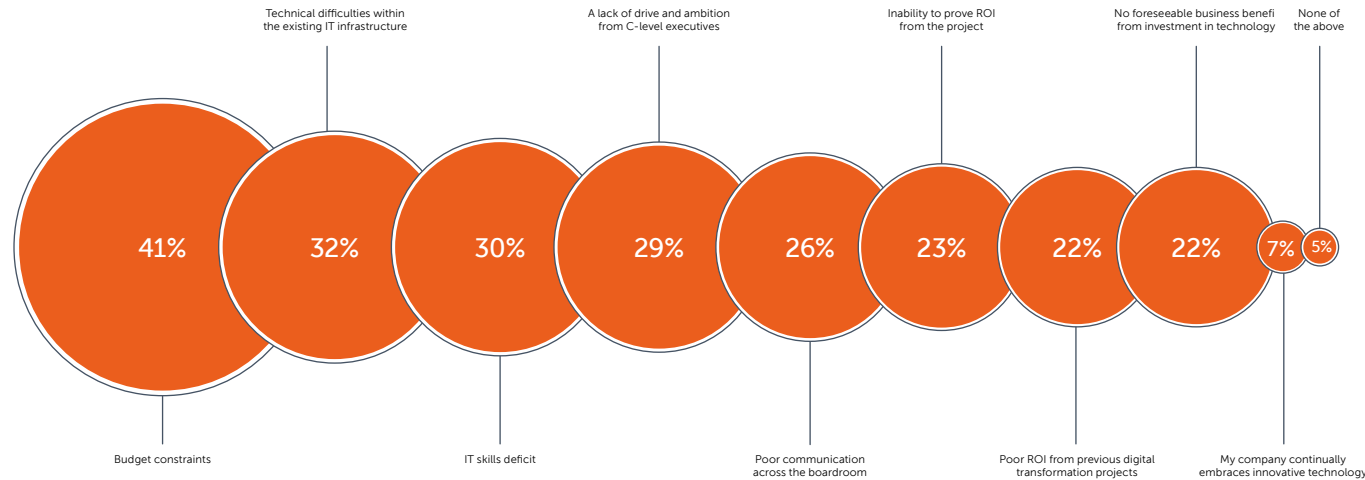


Beyond being able to keep up with the pace of change, it is budget constraints that are flagged as the top innovation barriers for all groups, as it relates to business technology. More than two-fifths of IT decision makers (41%), and at least three in ten C-Suite members (31%), believe this to be the case. This is followed by technical difficulties within existing IT infrastructure, IT skills deficits and a lack of drive and ambition from C-level executives – according to IT decision makers.

Business Audience: In your opinion, what are the barriers to innovation in your business' technology?



ITDMs: In your opinion, what are the barriers to innovation in your business' technology?



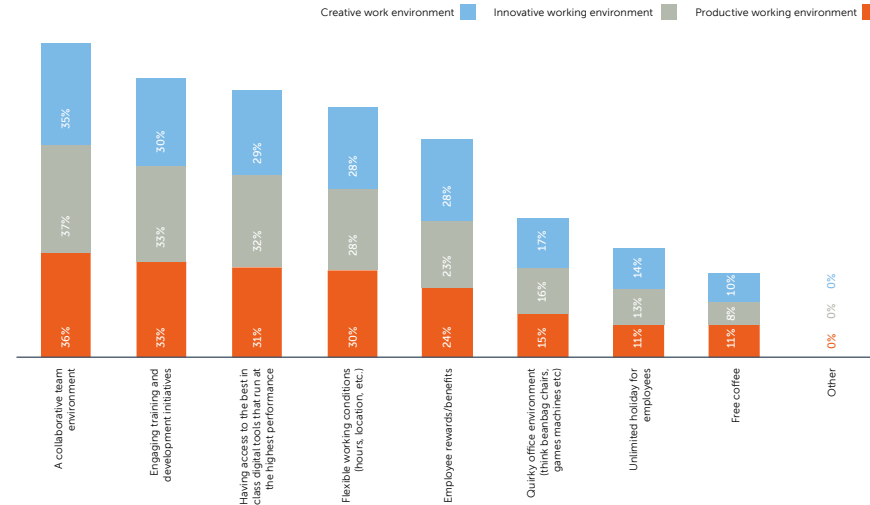
Humans and technology combined, that is what will make a difference to your business.

No matter how good the tech, the reality is, it all starts with a human experience. That is what sets companies apart.

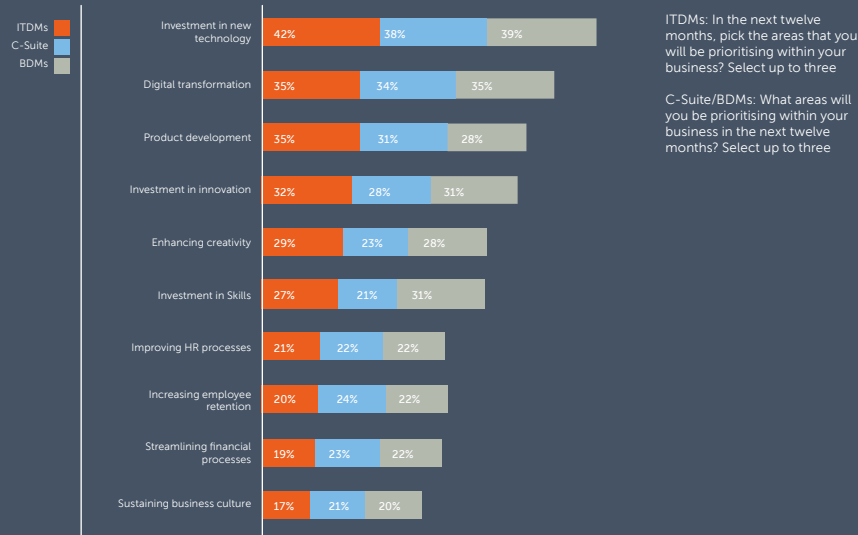
There is no doubt that technology is critical to business success in the 'digital first' age. But, in order for technology to deliver, your employees have to be engaged and have a seamless digital experience. The question is, what creates the most creative, innovative and productive work environment? According to employees, the top five things you must have are a collaborative team environment; access to best in class digital tools; engaging training; flexible working conditions; and employee rewards and benefits.

In the quest for growth and innovation, the C-Suite, business and IT decision makers all agree that investment in technology is a top priority over the next twelve months. This is followed by digital transformation, investment in innovation, and investment in skills.

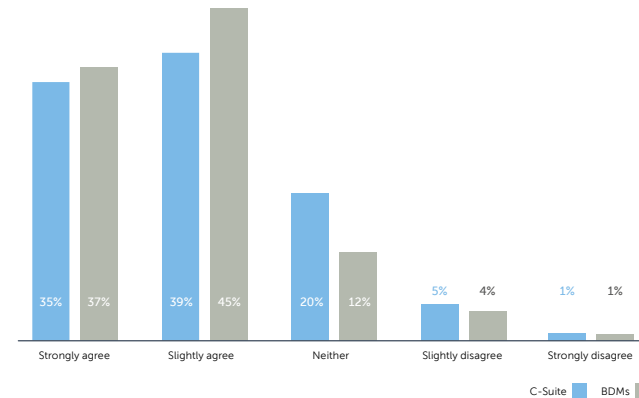
Which of the below do you feel are the most conducive to a creative/ innovative / productive working environment? (Select the top three)



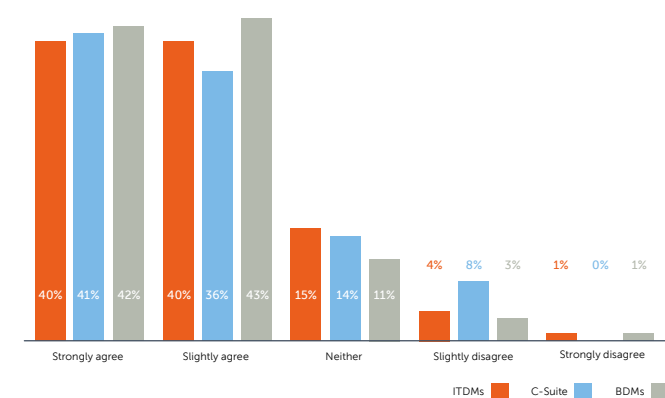
Investment in technology is especially vital as 74% of the C-Suite, and 82% of business decision makers, say their employees' productivity relies on having access to systems and applications that are best-in-class. In fact, this may be why more than three-quarters of the C-Suite (77%) believe that investing in next-generation technology is vital for the growth of their companies. A sentiment that is echoed by the vast majority of IT decision makers (80%).



To what extent do you agree or disagree with these statements?
My employees' productivity relies on having access to systems and applications that are best in class.



To what extent do you agree or disagree with these statements?
I believe that investing in next-generation technology is vital for the growth of my company.

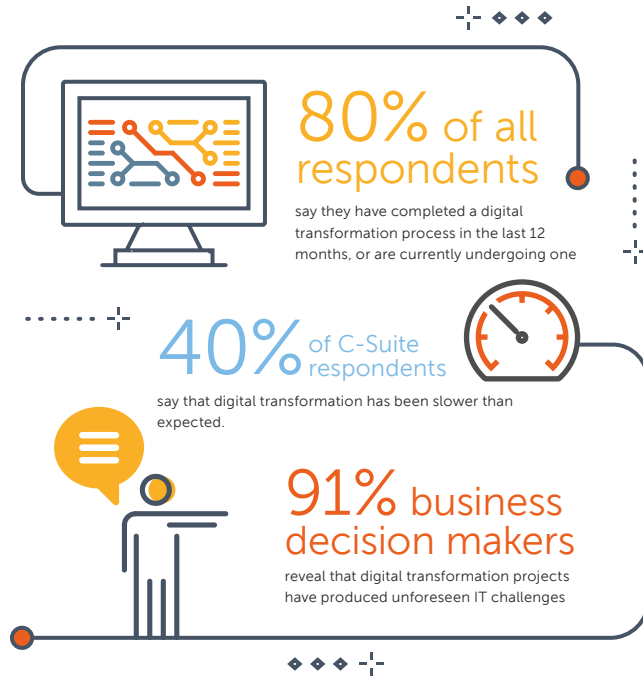


The age of digital transformation

It's clear that investment in digital performance and the right digital tools are critical to business success. Digital transformation plays a key role in ensuring that companies can be innovative, creative, productive and, crucially, that they remain competitive. With more than **\$2 trillion to be invested in digital transformation by 2022**, and companies already spending up to a third of their budgets on digital-first initiatives, the pressure is on business leaders and IT decision makers to ensure that they utilise new technological approaches. Furthermore, with budgets constrained, it is vital

that businesses prepare for the challenges of digital transformation and that the necessary culture is in place to deliver a successful outcome.

In the age of digital transformation, that is easier said than done and digital initiatives should not be fraught with risk. From complex integration with legacy systems to a lack of knowledge and resistance to change, businesses need full visibility over their digital transformation initiatives to set expectations with the wider organisation and meet the needs of stakeholders and employees alike.



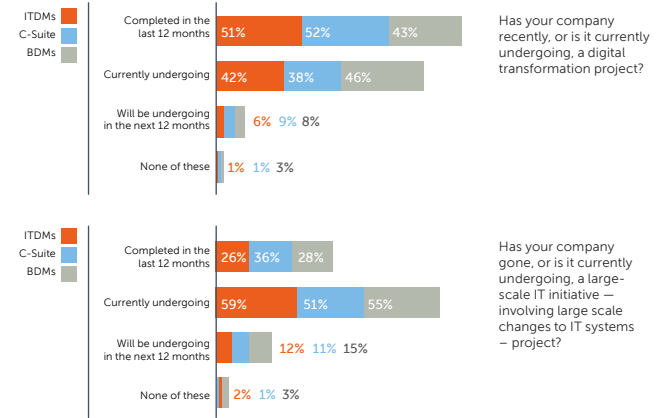
Digital transformation is the order of the day

Can your business stand up and be counted in the age of digital first?

Four in five of IT-, C-Suite- and business decision makers are currently undergoing or have undergone digital transformation initiatives within the last 12 months. In addition, according to business leaders (84%) and IT decision makers (84%), many businesses are also simultaneously undertaking large-scale IT initiatives that involve changes to IT systems.

Furthermore, almost all of those respondents that have not yet undergone a digital

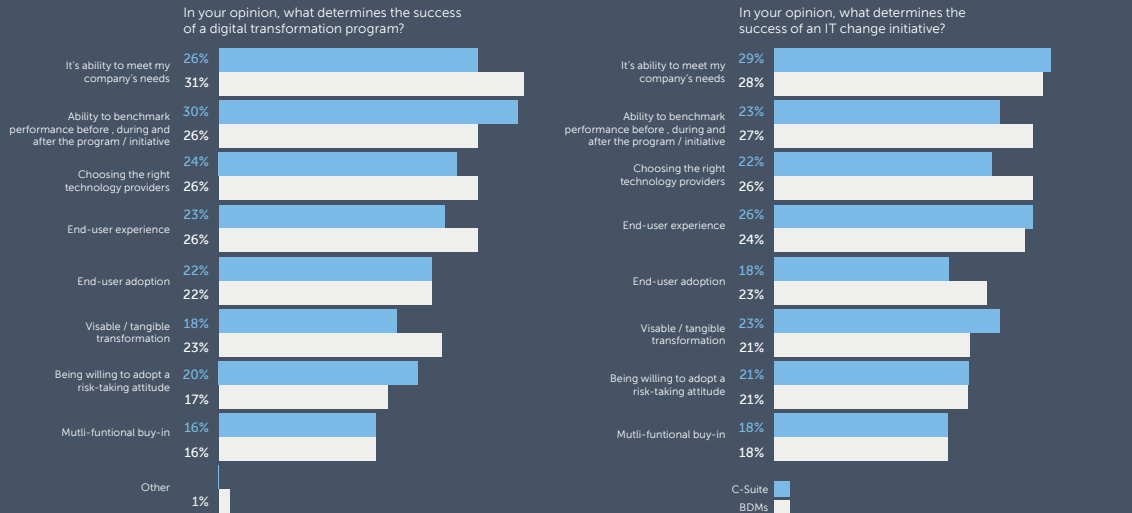
transformation, or a large-scale IT change initiative, say they will do so in the next 12 months. Digital transformation is the order of the day. But, just how much are companies investing? It turns out that over half of IT decision makers (54%) say their companies are spending 11-30% of their IT budget on progressing digital transformation projects. Interestingly, just eight in one hundred IT decision makers report to be spending more than 51% of their budget on digital transformation projects.



Transformation is driven by goals and not fears

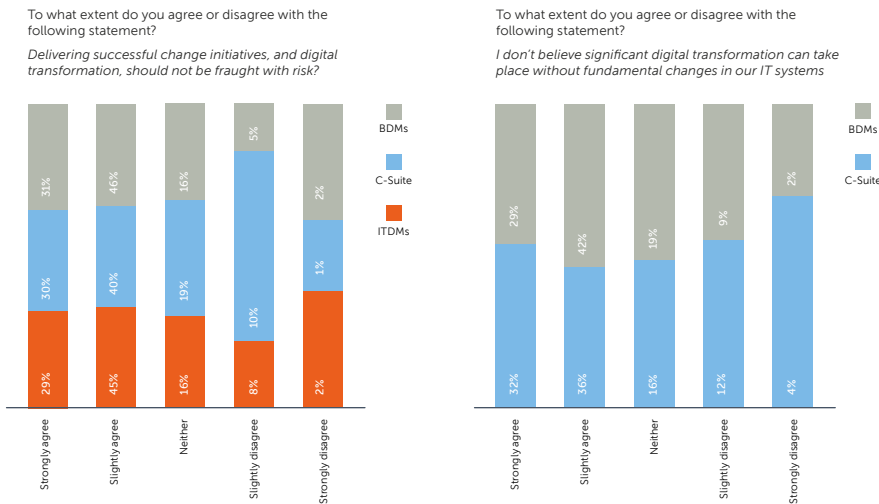
Change is coming for everyone. But for change to be successful, it must be done to meet and exceed expectations, with as little risk as possible.

Digital transformations and change initiatives are increasingly popular, but what determines their success? As it relates to digital transformations, three in ten C-Suite respondents (30%) reveal it is the ability to benchmark performance. Meanwhile, for business decision makers (31%), it is the ability to meet the needs of the company. For a change initiative, the ability to meet the company's needs is top of the list for both groups.



At the same time, as having clear ideas about what would make digital transformation and change initiatives successful, there is an expectation of risk mitigation during the process. More than four out of five IT decision makers believe that delivering successful change initiatives, and digital transformation, should not be fraught with risk.

This is despite 71% of business decision makers, and 68% of the C-Suite, revealing that they believe digital transformation without fundamental infrastructure change to be a myth.

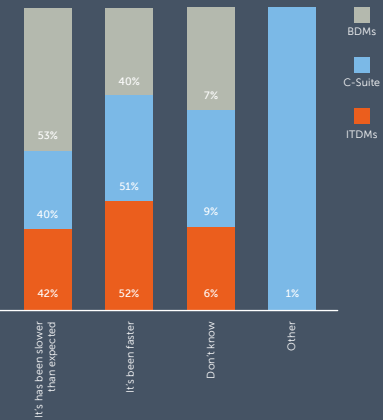


Digital change is not without its challenges

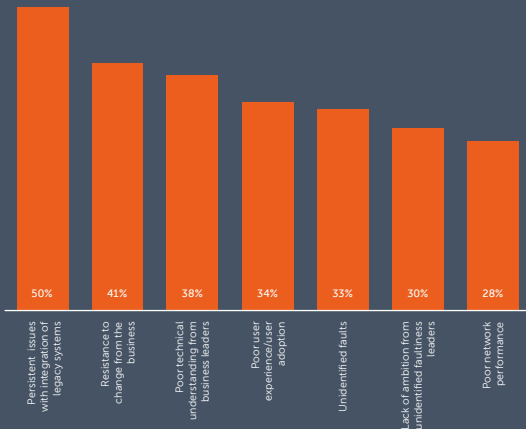
Despite the need to minimise risk and investment in digital initiatives — transformation journeys are not simple or seamless.

Unfortunately, change is not without risk. Around two in five respondents reveal that digital transformation has been slower than expected, in particular from business decision makers. This delay, according to business decision makers, can be attributed to a lack of knowledge of technology applications and resistance to change amongst their employees, whereas IT decision makers are more likely to blame issues with integration of legacy systems.

If you have completed a change initiative/project in the last 12 months, or are currently undergoing one — do you believe you've been slower and/or faster to utilise the benefits of these programs than you expected?



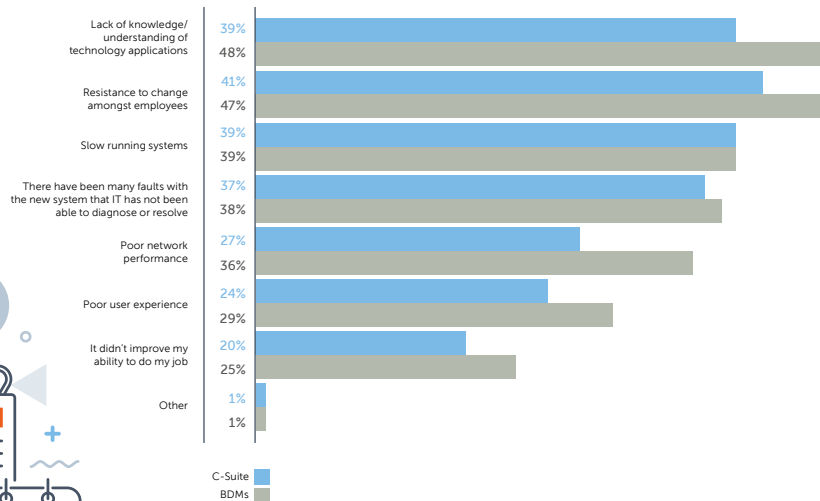
ITDMs: Please identify the top three reasons why this project did not live up to your expectations? (Select top three)



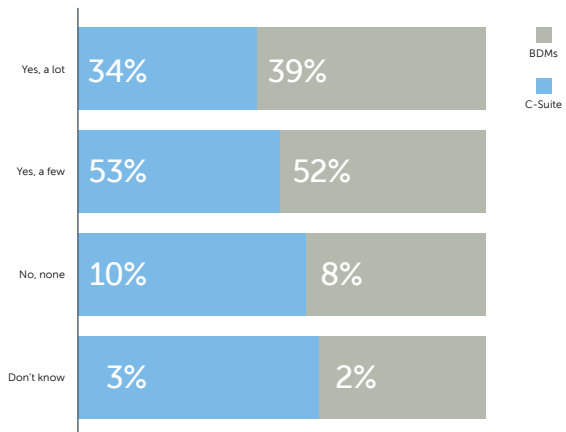
Slower than expected benefits aside, the majority of C-Suite and business decision maker respondents claim that digital transformation projects have produced unforeseen IT challenges, despite them believing they had realistic expectations regarding the outcomes.



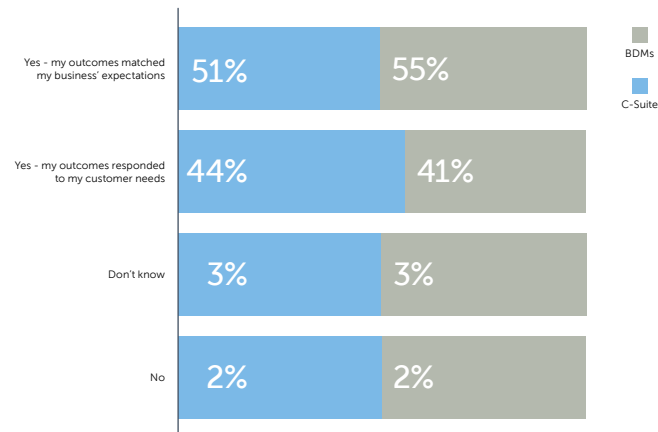
C-Suite and BDMs: Please identify why you've been slower to utilise the benefits of these programs?



C-Suite and BDMs: If you have undergone, or are currently undergoing a digital transformation project, has the process produced unforeseen IT challenges?



C-Suite and BDMs: Do you feel that you had realistic expectations regarding the outcomes of your digital transformation project?



The impact of IT infrastructure

Digital transformation is a critical part of any business journey to help spark creativity and drive innovation and productivity within an organisation. However, in order for digital transformations to reach their full potential, it is vital that companies have the ability to measure and manage the digital experience, and by extension, the modern IT infrastructure, to support this growth and cultural change.

Slow running systems not only act as a source of frustration for staff, but stunt their ability to be creative, innovative and productive. This in turn has a knock-on effect for

employee morale, company culture and business' growth as a whole. In fact, more than nine out of ten IT decision makers (92%) said they believe IT infrastructure has a direct impact on creativity, innovation and productivity of a business.

Recognising the connection between digital technology, human behaviour and business success is vital. In order to ensure flawless user experience, you have to be able to identify the cause of technological issues and, once these causes have been established, plan for how they can be overcome.

92% of IT decision makers

say they believe IT infrastructure has a direct impact on the creativity, innovation and productivity of a business

38% of IT decision makers

makers say that they receive queries about slow running systems at least once a day

29% of IT C-Suite

and 34% of business decision makers, say that they frequently receive comments on network speeds and services being slower than expected

Growth and success are intrinsically linked to digital performance

Innovation, creativity and productivity are tied up in digital experience including network, application and end-user performance.

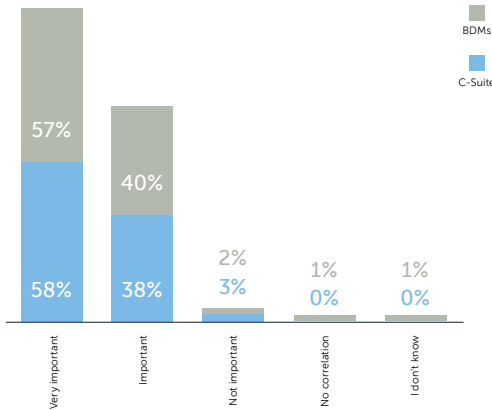
Digital enablement is considered vital to the majority of businesses. Almost all of C-Suite and business decision makers (96% and 97% respectively) feel that the connection between human behaviour and digital technology is important for the growth of the business.

Being digitally enabled begins and ends with the IT infrastructure and having

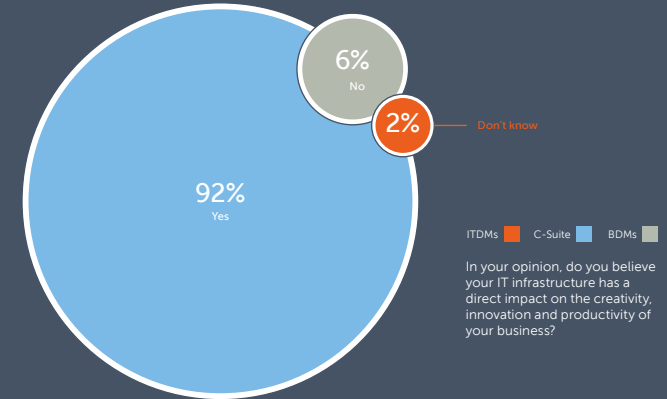
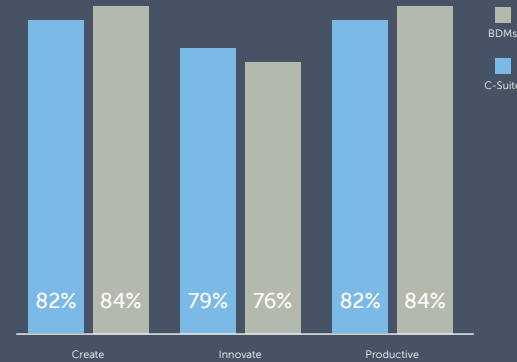
anything suboptimal is no longer an option. The vast majority of the C-suite and business leaders believe that a modern IT infrastructure plays an important role in enabling their organisations to be creative, innovative and productive — all of which are key elements in building a successful company that has a competitive advantage.



How important is the connection between human behaviour and digital technology for the growth of your business?



Does the IT infrastructure play an important role in enabling your organisation to be creative/innovative/productive?



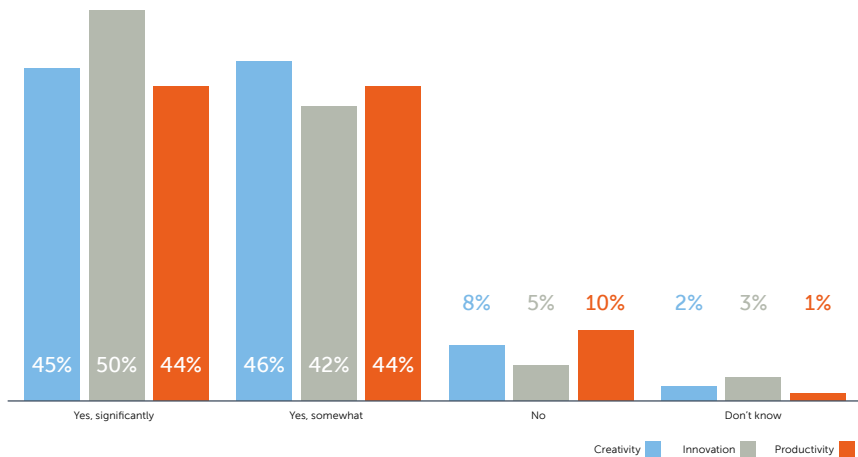
ITDMs C-Suite BDMs

In your opinion, do you believe your IT infrastructure has a direct impact on the creativity, innovation and productivity of your business?

Technology limitations are costing businesses money. In fact, 91% of the C-Suite believes a limit on creativity is impacting company budgets and the bottom line. A further 92% believe that technology limitations have an impact on innovation and productivity (88%), costing them even more.



Do you believe this limit on creativity/innovation/productivity is costing your company money?

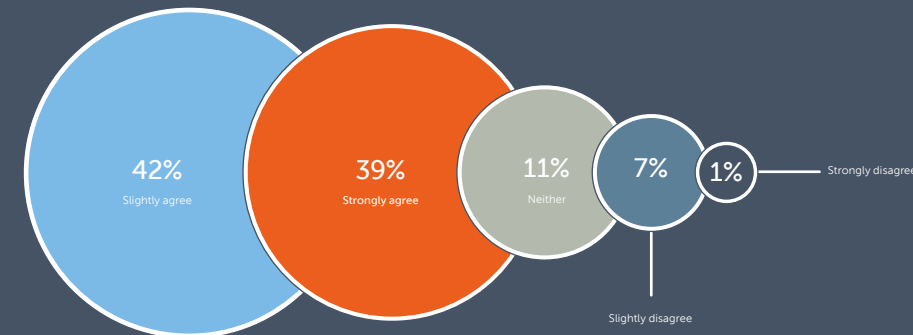


The pressure is on to ensure performance

There is a belief that everything possible is being done to ensure performance, but is it enough?

The sharp rise in the amount of data flowing through the network is putting pressure on IT leaders to deploy next-generation infrastructure. However, despite the importance that the C-Suite and business leaders are placing on digital performance, many IT decision makers believe they are doing enough. In fact, four out of five IT decision makers believe they are doing everything they can to make sure their network runs well.

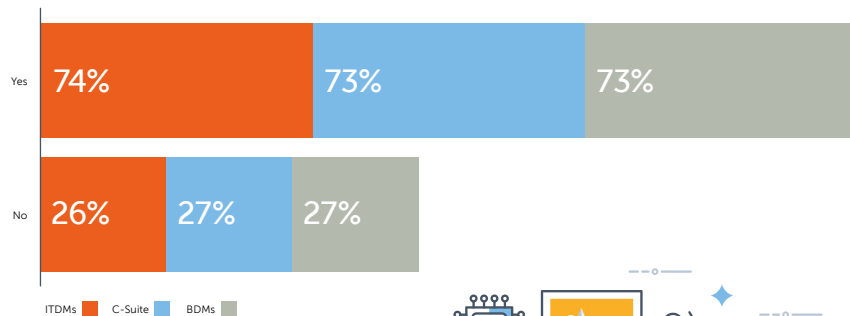
To what extent do you agree or disagree with these statement. I feel I am doing everything I can to make the network run well



The confidence of these IT decision makers might, however, be overstated. Nearly three quarters of C-Suite (73%), business leaders (73%) and IT decision makers (74%) felt frustrated by their company's IT performance, with legacy IT infrastructure and slow applications stated as key reasons for poor performance.

This is simply unacceptable. In the 'digital first' age, businesses cannot afford the cost that slow running systems and poor performance will have on their bottom line, and, fundamentally, the digital experience.

Have you ever felt frustrated by your network (organisation's technology infrastructure) or application performance?



A disconnect between speed and desire

Slow running systems are causing pain points from shop floor to leadership

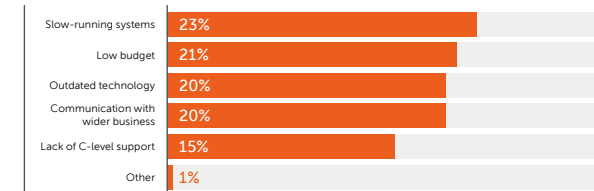
As we've seen, technology limitations, especially slow running networks, are impacting employees' job satisfaction, ability to do their work, and are thought to be costing companies money. But the biggest pain point for IT decision makers is slow-running systems, as consumers and employees demand always-on networks.

Almost two-fifths of IT decision makers (38%) say that they receive queries about slow running systems at least once a day, with 80% of IT professionals receiving complaints and infrastructure outages more than once a week.

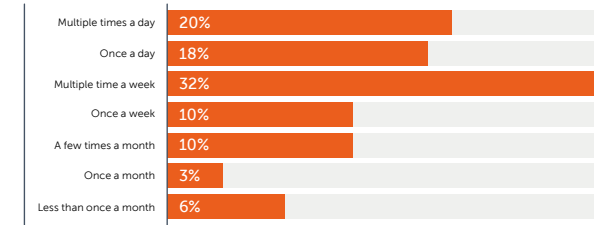
It's therefore clear that business leaders, C-Suite and IT decision makers must come together to ensure that they invest in the right infrastructure, or they will face business failure.

With the expectation of high digital performance now a staple within our working lives, achieving clarity over the cause of infrastructure issues is vital to identifying how to overcome the problems and identifying the right solutions that will drive business growth.

What is the single biggest pain point in your current role?



How often do you estimate you receive end-user queries about slow running systems?

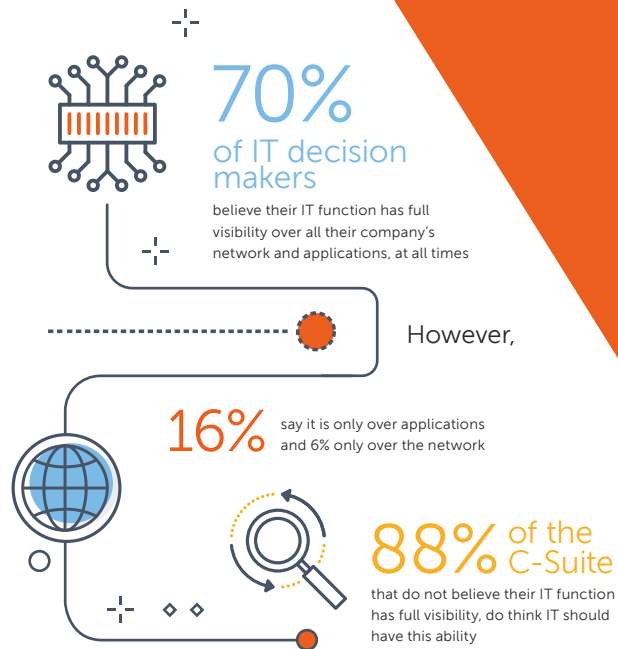


Digital experience management is the future

If you are unable to measure, you are unable to manage. And it is impossible to measure without visibility. Businesses today cannot afford to drive in the dark as they make key decisions around their IT estate and undergo radical digital transformation.

Seven in ten IT decision makers (70%) say they just have visibility over applications, network and end-users — and not necessarily full visibility over their infrastructure. It also means

that one in three don't have full visibility over applications, their networks and/ or end-users. Without comprehensive visibility, there is no way that IT decision makers can help their businesses measure the digital experience provided in their organisations. This is an area that requires focus, and one that must be addressed if businesses are to steer their organisations successfully through digital transformation initiatives.

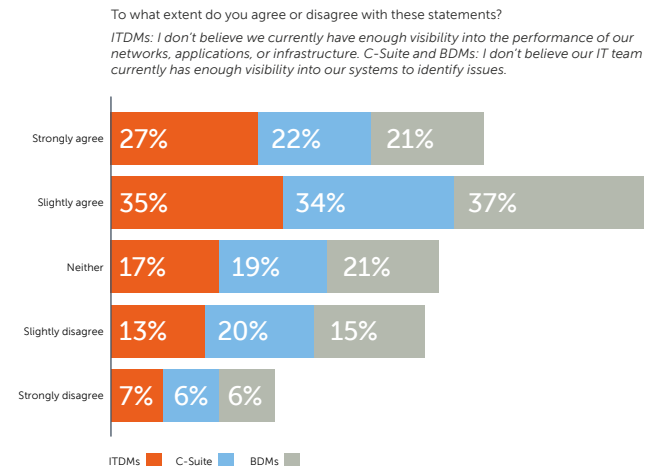


Visibility is vital but needs to be increased

There is a belief that visibility is critical, but that there's not enough of it as it relates to IT

Over half (58%) of business decision makers believe that they currently don't have enough visibility into the performance of their company's networks. This is significant as if the business feels that it does not have full visibility over the network and IT can't identify and fix pain points, then digital transformation efforts will falter. From complex integration with legacy systems to a lack of knowledge, and resistance to change, businesses need to be able to message and manage the digital transformation

initiatives, to set expectations with the wider organisation and meet the needs of stakeholders and employees alike. Both IT decision makers and business leaders see the benefit of having greater insight and visibility over digital performance, but the question remains why more investment is not being made. Especially as 83% of IT decision makers believe there should be more investment into technology solutions that enhance overall IT visibility.



The benefits of visibility, outweigh investment hesitation

Investing in visibility has to be a priority — or you could be creating risk.

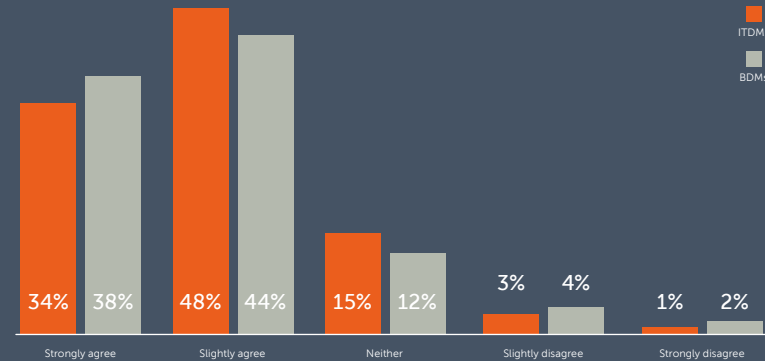
Business and IT decision makers agree on the fact that visibility into digital performance will bring significant benefits to their business. In fact, 73% of the C-Suite agree that increased visibility into IT performance is key to driving business innovation and staff retention. A statement that 80% of IT decision makers agree with.

But, despite this agreement, there is still a lack of confidence in the network and, as we have shown, leaders experience slow running systems and network outages on a weekly basis. This cannot continue and requires the C-Suite, business decision makers and IT decision makers to work together to invest in the right solutions, prioritise measurement and place visibility at the top of the agenda at the board level.

To what extent do you agree/disagree with the following statements?

ITDMs: I believe my executive team would benefit from me having greater insight into, and visibility over, systems performance in my organisation

BDMs: I believe the whole business would benefit from having greater insight into and visibility over digital performance

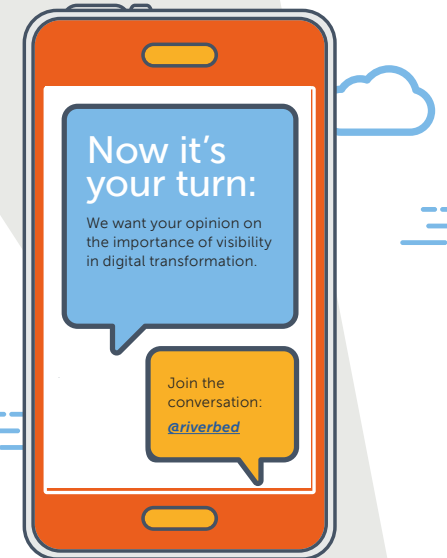


Conclusion

Businesses across EMEA's top priority is growth. As part of achieving this, all respondents to the research for this report have agreed that "making the most of the technology and people you have" is the single biggest influential factor in reaching this goal.

At Riverbed, we believe that technology should be an enabler of creativity, and a driver of innovation and productivity. We want to help the market evolve their network visibility and digital experience management capabilities, so that their technology can support their staff and ambitions.

Whether it's by monitoring the end-user experience, application performance or having the network infrastructure that underpins the rise in services, we understand that businesses need for solutions that will seamlessly support their creativity, innovation and productivity. With Riverbed's solutions in place, organisations do not need to worry about the unforeseen or wasted effort; they will know where they stand and how to engage and delight both employees and customers. This frees up the IT team to drive smart, focused, decision making about future technology, and the business team to rethink what is possible — and set and achieve new goals.



Research methodology

This study was conducted among three different audiences, all working within organisations with 500+ employees (sample base in brackets):

C-level decision makers
(204)

Business decision makers
(758)

IT decision makers
(764)

On behalf of Riverbed, Sapio – an independent research firm based in the UK – collected responses from each audience within six different countries/areas:

UK
(61 C-Level, 204 BDMs, 202 ITDMs)

Germany
(50 C-Level, 201 BDMs, 200 ITDMs)

Switzerland
(5 C-Level, 51 BDMs, 52 ITDMs)





France
(52 C-Level, 200 BDMs, 202)



Netherlands
(20 C-Level, 51 BDMs, 50 ITDMs)

Middle East
(16 C-Level, 51 BDMs, 58 ITDMs)



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