The ROOMn 2017 Observatory

For the third time, ROOMn – La rencontre d'affaires Mobilité et Digital - consulted professionals on how digital technologies are integrated in their companies.

In early 2015, 68% of respondents considered integrating digital technologies to be essential for the future of their activity.

In early 2016, general management, IS divisions and BUs expected the same benefits, considering that every part of the company was concerned. 52% had convinced their executive committee, 42% believed they had a vision of the strategy to be conducted, and 25% had already implemented projects.

So, where are they today? 160 companies responded

The survey was conducted on line between 20 December 2016 and 10 January 2017 by GoudLink x MRCC with decision makers involved in implementing corporate digital mobility.

Respondent profile
80% have more than 500 employees

Advancement level
Concerning digitisation, would you say that your company/ administration is:

Well underway	8%
Somewhat underway	56%
Barely underway	34%
Not started	2%
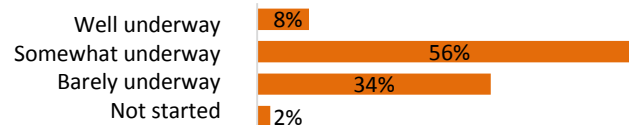
Areas of Activity

Services	36%
Administration, Regional governments, Government services:	30%
Industry:	20%
Retail:	14%

Three visions combine:
60% of respondents are IT, IS decision makers
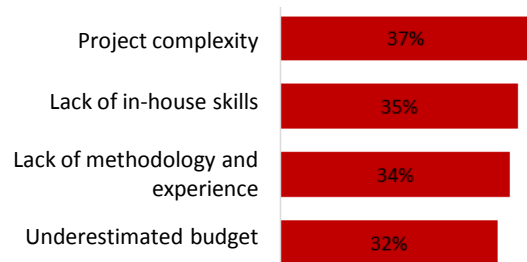30% from BUs
10% from General Management

The ROOMn 2017 observatory: Key lessons

88% believe they have made progress, and 30% a great deal of progress, in digitalising their company in the past two years.

Top four obstacles:

Project complexity	37%
Lack of in-house skills	35%
Lack of methodology and experience	34%
Underestimated budget	32%

Through their experiences, we have identified three keys to success:

1 IT / BU collaboration

2 Mobilisation of the entire company

3 Listening to customers

28% had underestimated the importance of IT and BUs working together

Speed and **pertinence** are the main benefits of cooperation between IT / BUs

On average, five projects are being conducted with a 2020 timeline.

79% will deploy a **user experience** project and just as many will **create digital workspaces** in the next three years
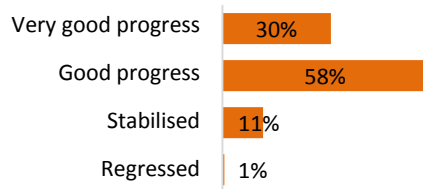
88% have made progress in digitalising their company

88% believe they have made progress, and 30% a great deal of progress, in digitalising their company in the past two years.
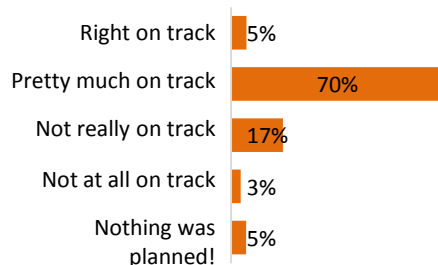
70% of respondents have seen expected progress, while 25% have had setbacks. 5% are right on track.

91% have encountered significant obstacles. Here are the Top Four: project complexity, lack of in-house skills, lack of methodology and an underestimated budget.

In the past two years, on this point [corporate digitalisation], it has:

Very good progress	30%
Good progress	58%
Stabilised	11%
Regressed	1%

Would you say that your progress is:

Right on track	5%
Pretty much on track	70%
Not really on track	17%
Not at all on track	3%
Nothing was planned!	5%

What types of obstacles have you encountered in deploying the digital transformation?

Project complexity	37%
Lack of in-house skills	35%
Lack of methodology and experience	34%
Underestimated budget	32%
Unexpected problems	24%
Not a priority for GM	16%
Chose the wrong technical solutions	8%
No obstacles	9%
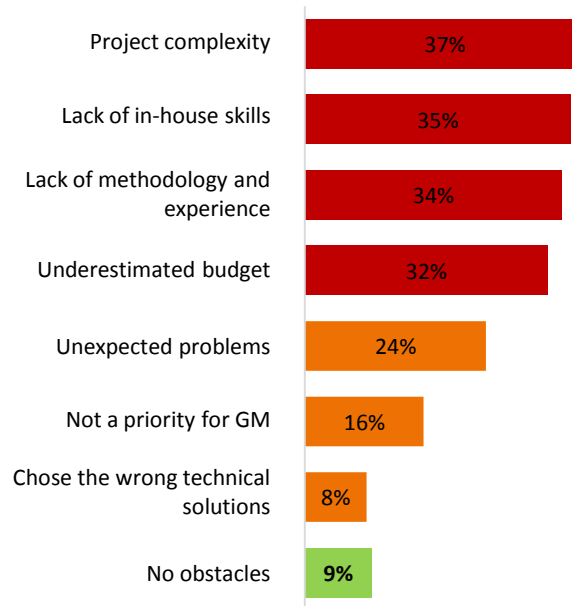
Benefits confirmed for innovation, still expected for sales

The digital transformation makes us more innovative: 69% agree

Other confirmed major benefits:
. Employee equipment (57%)
. Company image (53%)
. Productivity (48%)

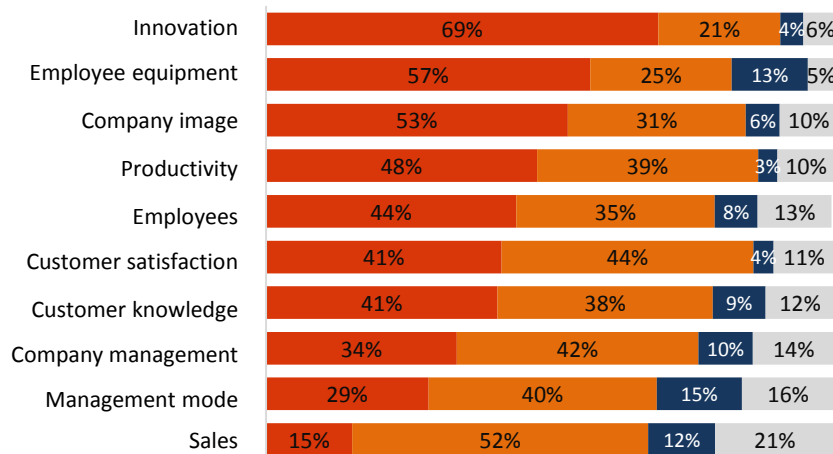41% of companies surveyed believe their employees benefit from the digital transformation, and 35% believe they will. **21% see no link between sales and the digital transformation.** Half of these are local governments and administrations.

On what points would you say that the benefits of the digital transformation have been confirmed?
Excluding "Don't know"

■ Confirmed effects ■ Expected effects ■ No effects ▢ Don't measure them

	Confirmed effects	Expected effects	No effects	Don't measure them
Innovation	69%	21%	4%	6%
Employee equipment	57%	25%	13%	5%
Company image	53%	31%	6%	10%
Productivity	48%	39%	3%	10%
Employees	44%	35%	8%	13%
Customer satisfaction	41%	44%	4%	11%
Customer knowledge	41%	38%	9%	12%
Company management	34%	42%	10%	14%
Management mode	29%	40%	15%	16%
Sales	15%	52%	12%	21%

Before & After: A new look at key points for success

Listening to customers, management modes, business model, IT/BU collaboration, mobilisation, collaboration with start-ups…
How important were these six key points before starting digitalisation, and how important are they today?

Companies consider getting IT and BUs to work together, mobilising the entire company and listening to customers as the most important points today.
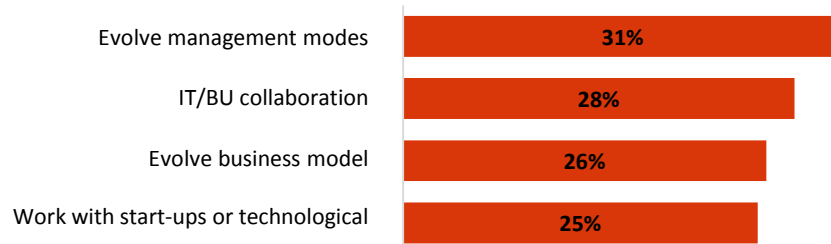
31% acknowledge having underestimated the need to change management modes, and 28% the importance of getting IT and the BUs to work together.

TOP Three Points today:
"Today, based on your experience…" Each element rated on a scale from 1 to 10

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Element	Value
IT/BU collaboration	7,7
Mobilise entire company	7,7
Listen to customers	7,5

The points most underestimated prior to advancing in their project:

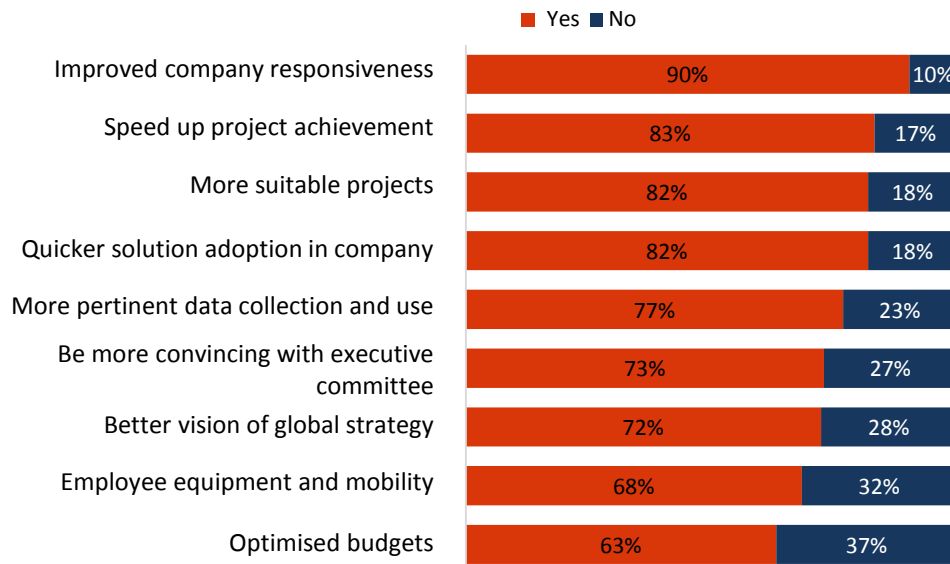| Element	Value
Evolve management modes	31%
IT/BU collaboration	28%
Evolve business model	26%
Work with start-ups or technological	25%

The benefits of collaboration between IT and the BUs

Speed is the top benefit of IT/BU collaboration: 90% believe that it improves company responsiveness, 83% that it accelerates projects, and 82% that it helps to adopt solutions more quickly.

It is associated with pertinence: 82% believe that this collaboration leads to more suitable projects, 77% more pertinent data collection and use, and 72% a better vision of the company's overall vision.

Last, 63% of respondents believe it optimises budgets.

In your opinion, does collaboration between IT and the BUs help:

Legend: ■ Yes ■ No

	Yes	No
Improved company responsiveness	90%	10%
Speed up project achievement	83%	17%
More suitable projects	82%	18%
Quicker solution adoption in company	82%	18%
More pertinent data collection and use	77%	23%
Be more convincing with executive committee	73%	27%
Better vision of global strategy	72%	28%
Employee equipment and mobility	68%	32%
Optimised budgets	63%	37%

Horizon 2020: Five front-line projects

Close to five projects on average have been identified for the next three years. The user experience and creating digital workspaces are the most common projects planned for 2020 and concern 79% of respondents.
More particularly, companies with over 1 000 employees: 83% plan to deploy a digital workspace, and 82% a user experience project.

Data mobilises 70% of respondents.
63% are interested in the Internet of Things.
Less popular, mobile CRM will be a focus for 50% of respondents.

Virtual reality (33%), chatbots (29%) and artificial intelligence (27%) bring up the rear for the next three years, but are still on the minds of 27% to 33% of respondents.

Do you plan to deploy a project on any of the following topics by 2020?

Legend: ■ Yes ■ No ■ Don't know

Topic	Yes	No	Don't know
User experience	79%	10%	11%
Digital workspace	79%	10%	11%
Big data/smart data	70%	16%	14%
Internet of Things/connected objects	63%	22%	15%
Mobile CRM	50%	25%	25%
Development of mobile ROI	37%	33%	30%
Virtual reality	33%	42%	25%
Chatbots	29%	44%	27%
Artificial intelligence/deep learning	27%	40%	33%