

The State of Deskless Work

Q4 2021 Research Report

DESKLESS PRODUCTIVITY: OVERCOMING THE AUTONOMY
AND EMPOWERMENT BARRIERS



Executive Summary

As part of the extended community of frontline workers and the teams that support them, you likely already know how important – and challenging – deskless work is. But did you know that deskless workers outnumber desk-based workers across the globe four-to-one? Or that most organizations anticipate their mobile workforce to grow over the next year? ¹

Meanwhile, we are entering an age of unprecedented worker empowerment due to a confluence of factors ranging from increasingly competitive talent markets, a growing “free agent” mentality among skilled mobile workers, and the allure of flexible employment options courtesy of the gig economy. The criticality of retention and cost of attrition for employers with mobile workers has never been greater.

¹ Skedulo, Solving the Software Gap for the Growing Community of Deskless Workers, August 2020

This report will serve to illustrate both our challenging current state and the opportunity in front of us. Today's deskless workers are largely deprived of autonomy, ill equipped to handle increasingly dynamic and complex work environments, and face leadership that continuously prioritizes alternative investment areas. Standout findings from this research include:

- 1. Deskless work is highly dynamic:** 92% of organizations report their deskless workers' jobs are regularly cancelled, distributed across many locations, and composed of many different work types, each requiring a specific set of worker skills, attributes, and formal certifications.
- 2. Organizations with a high volume of deskless workers lag behind in digital transformation:** only 6% of respondents rely entirely on digital processes for deskless work, while 44% of organizations rely on paper-based processes half of the time or more.
- 3. Deskless workers lack autonomy and control:** only 6% of organizations feel their deskless workforce is "very autonomous", while less than one-in-ten deskless workers have "a high degree" of control over their schedule and nearly one-in-three have low or limited control.
- 4. While the value of autonomy is recognized, the employee experience ranks low among strategic priorities:** 97% of organizations agree increased employee autonomy would improve retention, client satisfaction, performance, and market share, with nearly one-in-six respondents strongly agreeing. However, improving employee experience and empowering mobile workers ranked lowest among strategic priorities for respondents.



In the face of these findings, we have a chance to empathize with the rigorous nature of deskless work, the challenges deskless workers face, and begin to recognize the deskless productivity opportunity – to drive towards a world in which deskless workers are empowered with autonomy, technology that complements and extends the capabilities of deskless workers, and where organizations take a more deliberate approach to building an employee experience that increases retention, improves client satisfaction, and ultimately differentiates service providers in the marketplace.

Many organizations are experiencing a growing pressure to [simplify working life](#) for valuable employees and equip them with the best resources. To unlock the deskless productivity opportunity, innovative firms are increasingly making investments in their employment brand, reevaluating their value proposition to prospective hires and current employees, and assessing the digital toolbelt they arm deskless workers with.



Our hope is that this report serves as a springboard for reflection and dialogue within your organization, a reference point for conducting your own internal research, and a catalyst for a more productive, positive, and impactful state of deskless productivity.

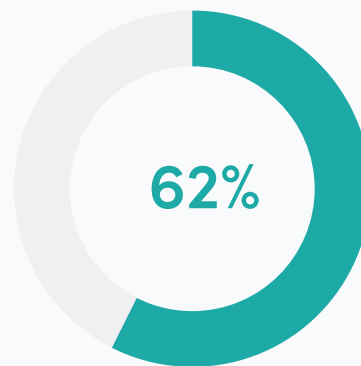
Deskless Work is Increasingly Prevalent, Important, and Dynamic

Deskless work comprises a wide range of work, from mobile caregivers delivering healthcare services in the home to telecommunications technicians servicing equipment in the field, from solar energy technicians installing solar panels on roofs across the world to CPR trainers delivering classes on the road.

The deskless workforce is large, with **80%** of the global workforce consisting of mobile – or deskless – workers, outnumbering desk-based workers four-to-one.

In fact, in the August 2020 Skedulo study “Solving the Software Gap for the Growing Community of Deskless Workers”, over three quarters of respondents indicated their workforce includes at least a double-digit percentage of deskless workers, while **14%** of organizations shared that more than half of their workforce is deskless. ²

Even in the midst of the pandemic, **62%** of organizations expected their mobile workforce to increase over the next **12-24 months**, while **34%** anticipated that employee base to remain consistent. Only one-in-twenty organizations expected a decrease in the size of their deskless workers. ³

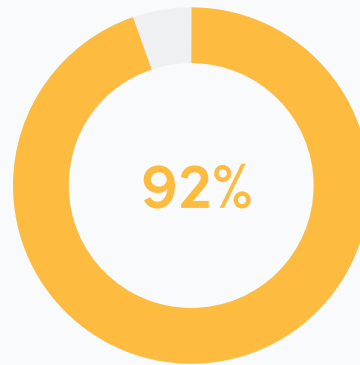


62% of organizations expect mobile workforce growth

² Skedulo, *Solving the Software Gap for the Growing Community of Deskless Workers*, August 2020

³ Ibid

Deskless work is not only exceedingly common, it is also highly dynamic, with **92%** of organizations reporting their deskless workers jobs are regularly cancelled, distributed across many locations, and composed of many different work types, each requiring a specific set of worker skills, attributes, and formal certifications.



**92% of desk-less work
is highly dynamic**

Given the majority of deskless work is dynamic in nature and often complex, deskless workers are challenged with a rigorous set of obstacles, ranging from navigating to job sites – often with job-specific equipment, battling traffic, performing complex work, documenting that work, communicating with clients and colleagues across locations, and managing intra-day changes when a cancellation occurs or work parameters shift. Organizations, meanwhile, endeavor to retain employees, battling high attrition rates.

Employee retention remains a top challenge for many organizations with a large deskless workforce. One organization in the healthcare space shared they saw a high correlation between the number of end-of-life experiences a worker had been associated with and their likelihood to leave the organization and saw an opportunity to track that statistic digitally, flag instances where additional consideration was required, and allocate work accordingly.

Organizations with Deskless Workers Lag Behind in Digital Transformation

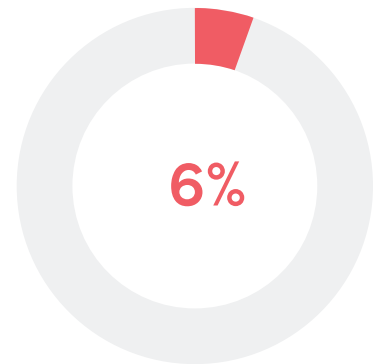
Despite the complex and dynamic nature of this work, deskless workers remain woefully ill equipped compared to their desk-based counterparts.

According to a 2018 study by Emergence Capital, 99% of software venture capital investments target software aimed at desk-based workers. Considering the four-to-one ratio of deskless to desk-based workers, ⁴ deskless work represents an underinvested in area by a factor of 80 based on the sheer volume of workers.

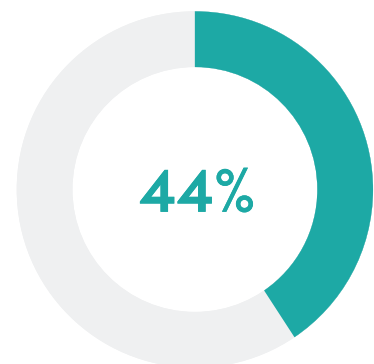
In an August 2020 Skedulo study, despite touting a high percentage of deskless workers at their companies, 76% of CIOs agreed or strongly agreed software vendors have overlooked deskless workers with regards to their product needs. Not one respondent strongly disagreed with this sentiment. ⁵

The data serve to illustrate the surprisingly early stage of digital maturation in organizations with a high deskless worker population.

When asked to identify roughly what percentage of their deskless work operations were paper-based versus digital-based, it was revealed that only 6% of organizations relied entirely on digital processes for deskless work. Meanwhile, 44% of organizations rely on paper-based processes half of the time or more. This means tasks such as dispatching and allocating work, task tracking, work documentation, and so on are often performed manually via pen and paper.



Only 6% of organizations rely entirely on digital processes

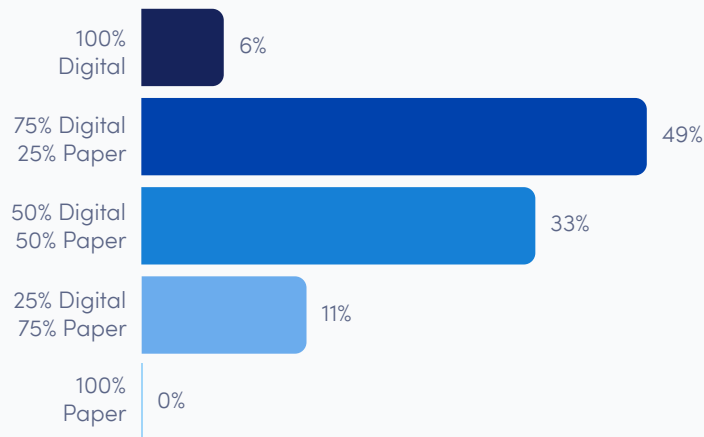


44% of organizations rely on paper half of the time or more

⁴ *The Rise of the Deskless Workforce*, 2018, Emergence Capital, <http://desklessworkforce2018.com/>

⁵ Skedulo, *Solving the Software Gap for the Growing Community of Deskless Workers*, August 2020

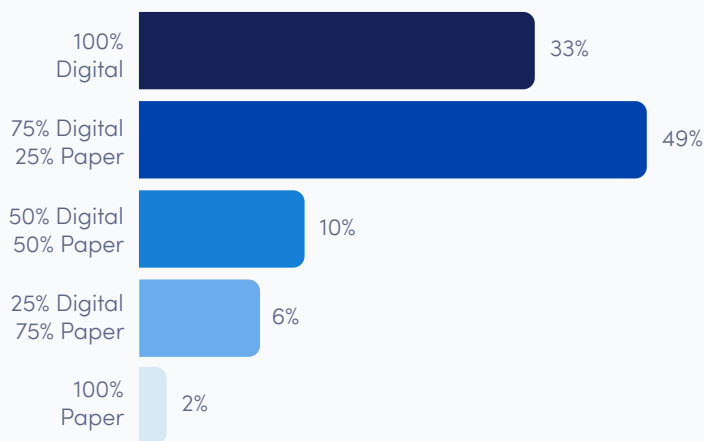
**How much do your mobile workforce processes rely on paper today
(e.g. providing workers with work details, tracking work conducted including
job details and time sheets)?**



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Optimism springs eternal, though, as 33% of organizations anticipate arriving at a 100% digital-based world for deskless workers in the next one to two years. However, roughly one-in-six organizations expect to remain locked into paper-based processes at least half of the time in the next one to two years.

**Over the next 1-2 years, from entirely digital to entirely paper-based, where
do you anticipate your mobile workforce processes to fall?**



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Interestingly enough, while respondents acknowledge the pitfalls of paper-based processes for mobile work, they seem to care more about manual errors and business intelligence than the employee experience of their deskless workers when considering the reasons.

Most commonly cited drawbacks of paper-based processes for mobile work

1. Decreased efficiency
2. Increased risk of human error
3. Decreased ability to incorporate data in business intelligence / metric tracking
4. More time consuming for employees
5. Increased environmental impact
6. Frustrating for employees

Meanwhile, innovative organizations are investing in digitizing their processes, as a technology manager of a ground engineering and asset preservation firm explains:

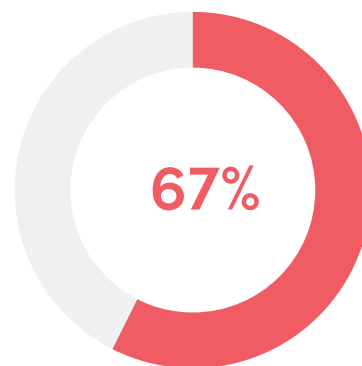
“The business needed to move from paper-based processes to digital processes. We had a huge amount of paper-based work, combined with Excel spreadsheets and information on whiteboards. We decided to go digital to both become more efficient, and do more with less.

**For managers, daily dashboards give a helicopter view of what we have scheduled and how we’re performing against targets. All that information is at our fingertips and allows us to modify our trajectory, which is very powerful...
We’ve gone from 100% paper-based to 90% digital.”**

Communication for Deskless Workers is Challenging and Remains Fragmented

One of the primary challenges of deskless work remains facilitating communication modalities for deskless workers, including communication between fixed-location workers and mobile workers as well as mobile workers and their clients in the field.

Ad hoc communication via email or phone is the primary option for a shockingly high **67%** of organizations, while over **one-in-five** organizations lack a dedicated messaging application at all. Meanwhile, half of deskless workers are forced to communicate in a different application than what they already operate out of to manage and execute mobile work, juggling between applications while in the field.



67% of organizations rely on ad hoc communication via email or phone

Deskless Workers Have Limited Autonomy

While many desk-based workers may stare out the window imagining the novelty of a more geographically dynamic workday, the reality for deskless workers is one of limited autonomy and control.

In fact, only **6%** of organizations feel that their deskless workforce is “very autonomous,” while **4%** of organizations indicated they deliberately limit the autonomy of their mobile workers.

Smaller organizations with 51 to 200 employees were twice as likely to report their deskless workers as autonomous as compared to larger organizations with 5,000 to 10,000 employees.

Less than **one-in-ten** deskless workers have “a high degree” of control over their schedule, while nearly one-in-three have low or limited control.



The Value of Autonomy: Theory vs. Practice

The good news is that there is near universal agreement – 97% – that increased employee autonomy would improve retention, client satisfaction, performance, and market share, with nearly one-in-six respondents strongly agreeing.

A similarly high percentage of respondents – 94% – recognize the strong connection between deskless worker autonomy, employee satisfaction, and market performance. In fact, many organizations use the autonomy they provide employees as a differentiator in the talent market, as the CEO of a Pediatric Home Healthcare firm shared, “Giving our mobile clinicians options and control over how they spend their time is part of our strategy for recruiting and retaining the best pediatric clinicians in the state.”

Over fifty-percent more healthcare respondents (20%) strongly agreed there is a connection between their deskless workers’ autonomy, employee satisfaction, and market performance as compared to non-healthcare respondents (13%).

Asked to rank the anticipated improvements if workers had more autonomy, respondents indicated, in sequence, job performance, employee retention, client satisfaction, and market share.

Strategic organizational priorities ranked by importance

1. Improving customer service & satisfaction
2. Improving employee retention
3. Improving product / offering
4. Differentiating against competitors
5. Improving employee experience and empowering mobile workers

Unfortunately, despite the recognition of the value of worker autonomy in theory, improving the employee experience ranked lowest among strategic priorities. This ranking was consistent across healthcare, utilities, and real estate, among other industries.

In short, while many organizations are talking the talk – recognizing that deskless worker autonomy would positively impact a wide range of key performance factors, it seems few are walking the walk, leaving the door open for employee frustration, attrition, and, ultimately, innovative competitors to sweep up skilled employees.

Conclusion: The Opportunity Ahead

While the findings presented here may betray our hopes and noble intentions when it comes to the large, critical, and complex nature of deskless work, it does not mean we are without hope.

Collectively, we can choose to see the glass half full, and recognize the opportunity in front of us. The reality is many organizations are making substantial investments in their deskless workforce, offering greater flexibility and autonomy while equipping them with digital tools that offer the level of sophistication and support many desk-based workers have been benefiting from for some time.

Organizations that choose to make that investment are witnessing an appreciable transformation in a range of critical performance factors, from employee retention and job satisfaction to service satisfaction, workforce utilization and work capacity, market share, and, ultimately, revenue.



For those of us that believe in evolution before revolution, there are no shortage of manageable, short-term steps to consider before reinventing the way work is managed at our organizations.

Consider using a no- or low-cost survey tool to benchmark your organization relative to the findings presented in this report, digging into employee satisfaction, analyzing historical attrition patterns, or evaluating deskless workers' sense of autonomy and control. Run quarterly studies, and use results to inform strategic priorities and measure effectiveness of new initiatives. Hold open forum discussions for dialogue with the deskless workers themselves.

The past several years have presented an enormous opportunity to increase the visibility of deskless work and highlight its importance. Collectively, we are at the precipice of a new era of deskless work. We simply need to listen to deskless workers, invest accordingly, and widen the aperture of the digital transformation desk-based workers have been appreciating for some time to include the entirety of the workforce.

We invite you to join us in our mission to champion the deskless workforce.



Report Demographics

This report was based on a global study of 240 respondents that were identified as individuals in organizations with a deskless workforce that ran from August 2021 to September 2021, with the demographics as follows.

Region: 74% North America | 14% Europe, Middle East, and Africa | 12% Asia-Pacific

Title / Level: 28% CxO | 33% VP | 38% Director | 1% Manager

This report also included insights from interviews with deskless workers conducted from January 2020 through October 2021.

About Skedulo

Founded in 2013, Skedulo is headquartered in San Francisco with offices in Australia, Vietnam and the United Kingdom. Skedulo's leading Deskless Productivity Cloud solution powered by AI and machine learning empowers organizations to manage, engage and analyze their deskless workforce, supporting the 80% of global workers who don't work in a traditional office setting. Skedulo's platform helps enterprises intelligently manage, schedule, dispatch and support deskless workers on the go, whether they are in fixed location facilities or mobile field workers on the frontline. Skedulo has enabled hundreds of organizations, including The American Red Cross, DHL, and Sunrun, to seamlessly schedule and service over 35 million appointments worldwide. The company has secured over \$115 million in funding to date, led by Softbank, Microsoft's venture firm M12, Costanoa Ventures and Blackbird. For more information, please visit www.skedulo.com or follow @Skedulo on Facebook and LinkedIn.

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