

Pandemic impacts on the way we work

Qualitative analysis and frequency count
of themes across 194 client interviews



What did we do?

We interviewed 194 clients about their issues, challenges, business situation and future expectations in the times of Corona.

We are incredibly thankful. Never before have we so quickly had a chance to listen to so many of your valuable insights.

What was the need behind it?

To understand an unprecedented situation through the eyes of our clients and partners.

Why have we chosen interviews over an online survey?

- Info coming straight from our markets, clients and closest companies
- Spontaneous narratives instead of multiple choice questions = no assumptions
- It was not just about research – we also wanted to strengthen relationships!

Who is behind this?

A team of 50 colleagues who did the interviews and 7 people who analysed it.

Outcome

194
interviews

38 top management members (C-level, owners)

33 senior leaders (directors, partners)

33 managers and team leads

88 users (specialists)

Wide variety of industries

- Advertising
- Automotive
- Architecture
- Consultancy
- Data science
- E-commerce
- Energy
- Engineering
- Finance
- IT
- Logistics
- Legal
- Media
- NGOs
- Real Estate
- Retail
- Sales
- Telco
- Transport

Data collected

- Company
- Segment
- Size
- Type in country (HQ, branch, local)
- Date of interview
- Position
- Country
- Consent
- Notes = qualitative data

How to read the results?

Specifics of the method

Method

- Data from interviews was collected through an online form where interviewers submitted their notes and basic info about respondents
- We qualitatively analysed 120 pages of notes from interviews
- Each statement (meaning unit) was coded and over time we created categories of themes that appeared repeatedly
- All separate statements were arranged in categories while all themes mentioned by more than two respondents were taken into consideration
- All statements were mapped back to data about the respondent (company, size, segment, position, etc.) and frequency charts were created to understand appearance of themes across the population

How to interpret results

The interviewers asked about 4 areas of interest:

- How has the company coped since the onset of Corona?
- What issues and challenges they face right now
- What do they expect from the future
- How has their attitude towards the office changed

Each interview was unique and elaborated on different topics. The interviewers followed what each respondent spontaneously started sharing as important.

Therefore number of mentions means X number of people considered the theme important enough to bring it up spontaneously. It does not mean that respondents and companies who did not mention it did not experience the same. They just did not consider it important enough at that time to mention.

Results

Themes across the data: what did we learn?

Themes

Overview of core categories that were identified across interviews

Corona related office change

1. Immediate Strategies: Coping with Corona Onset
2. Coming Back to Office Policies

Experiencing Home Office

3. Experiencing Home Office – Positive
4. Experiencing Home Office – Negative

Attitudes to remote work

5. Realising That Remote Work Works
6. Red Flags in Remote Cooperation

State of business

7. Business Going Up and Proactive Tactics
8. Business Going Down
9. Problematic Sales
10. Future Business Considerations

Future beliefs, ideas, worries

11. Future Hopes and Beliefs
12. Ideas
13. Worries

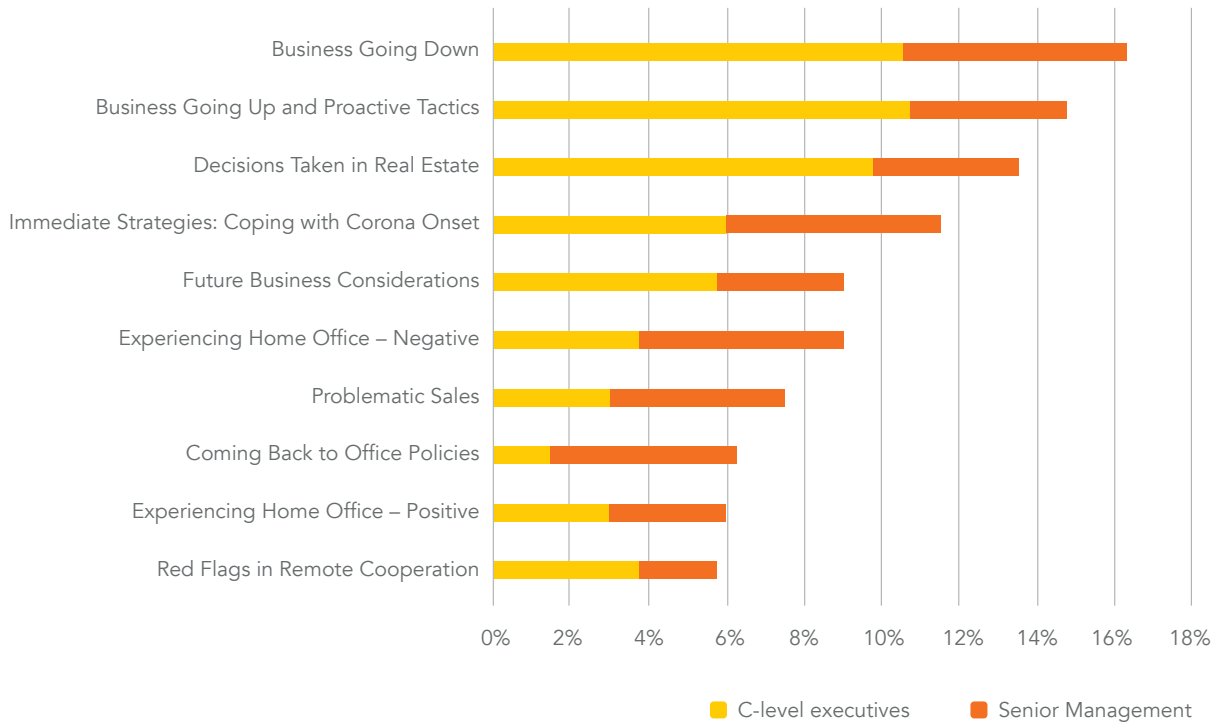


Mentions of categories in interviews

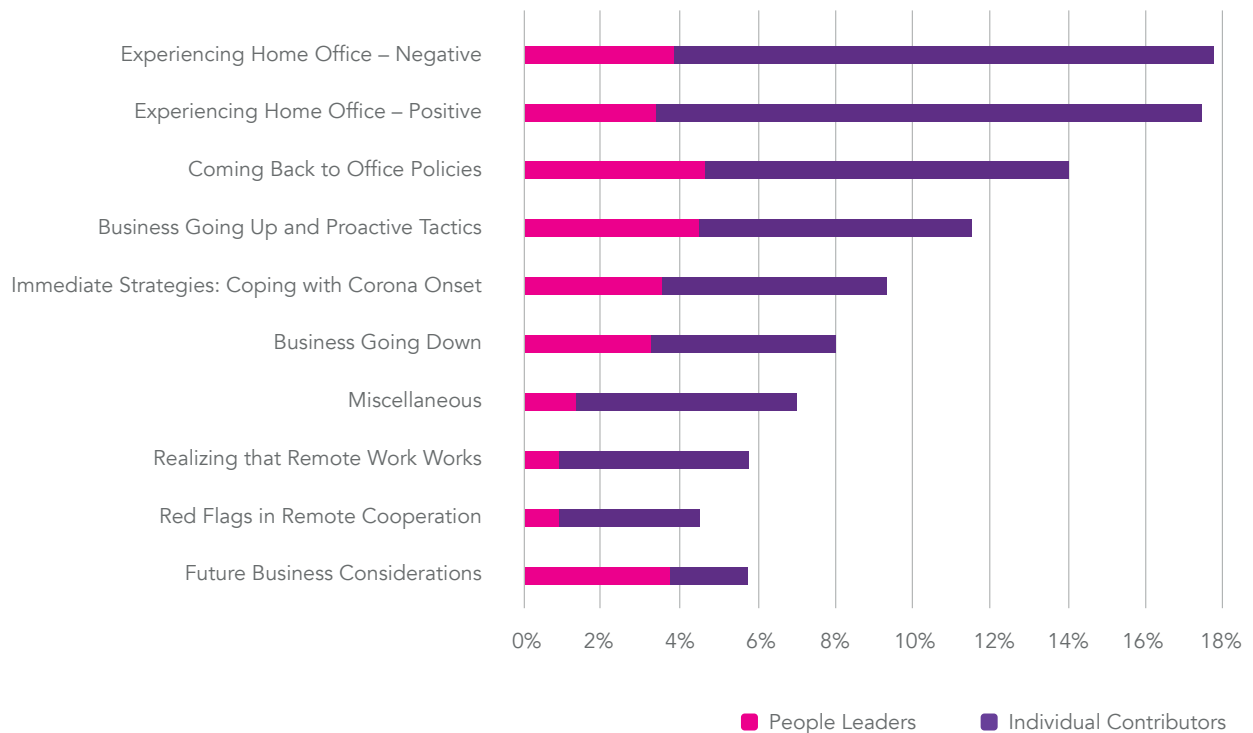
Category	No. of interviews
Experiencing Home Office – Negative	138
Business Going Up and Proactive Tactics	123
Experiencing Home Office – Positive	117
Business Going Down	107
Coming Back to Office Policies	104
Immediate Strategies: Coping with Corona Onset	104
Future Business Considerations	57
Problematic Sales	52
Red Flags in Remote Cooperation	49
Realizing That Remote Work Works	43
Miscellaneous	42
Future Hopes and Beliefs	29
Future Beliefs About The Office	22
Ideas	9



Top 10 topics of decision makers



Top 10 topics of operative levels



1. Immediate Strategies: Coping with Corona Onset

This category describes strategies that our clients took in the first weeks of Corona.

Main themes:

- 1/3 of companies mentioned full mandatory home office while immediately establishing remote cooperation instead.
- Common immediate workforce or worktime reductions included part time to take care of kids, part time required by the company, reduced employment or wages, and project audits.
- Majority of small companies described that their operations continued without change, since they either worked remotely before or continued going to work at the time of interview like before.

While mandatory home office was equally mentioned by all sizes of companies, workforce and worktime reductions as well as operating without change were mentioned more by small sized.

Immediate strategies: Coping with Corona onset

104 mentions

Mandatory HO & establishing remote cooperation	68
Operation without change (worked remotely before, or still going to work)	20
Workforce or worktime reductions (part times to take care of kids, part times required by the company, reduced employment or wages, project audits etc.)	16

Change in operation was significant – home office rose from 5 – 10% of employees to more than 95% employees.

We are fully working on the mandatory home office, so we have now almost 30 000 m² for 20 people (facility and IT teams).

Company reduced working hours and salaries to cope with loss of deals/fees generated.

We don't feel affected; most of the time, we used to work online.

2. Coming Back to Office Policies

This category describes identified policies and behaviours related to office comeback.

Main themes:

- Respondents mentioned dependence on government policies as well as global corporate policies.
- Among the most common policies respondents mentioned social distancing, usage of masks, gloves and disinfectants, new cleaning policies and capacity regulations.
- Some reported on changed food and beverage serving policies, but many also mentioned self-imposed changes in eating behaviour.
- 27 respondents mentioned that comeback to the office will be gradual over periods of months or voluntary.

Coming Back to Office Policies

104 mentions

Capacity regulation and social distancing	24
Changes in food and beverage serving or Habits	7
Delayed or gradual comeback (not planning yet)	16
Dependence on government policies	5
Masks, gloves, disinfectants	13
New cleaning policies	3
Policies are driven globally, on corporate level	13
Rotating teams	12
Voluntary comeback	11

Canteen – not going to reopen any time soon.

In Q2; first started with 50% in home 50% in office (A/B teams); present: 20% in the office, 80% in home office; business as usual; most teams manage it well; some teams have a person on duty at the office doing the distribution of hardcopy materials, scanning, etc.

Then all employees will be voluntarily allowed in the office, but not view to have everyone back in the office full time.

Return planned in weekly waves, the timing is that end of Budapest lockdown +1 month is first wave, up till September ideally all of them.

3. Experiencing Home Office Positively

Positive perceptions of home office experience during lockdown.

Easy adjustment

More than 30 respondents described how easy and natural adjusting to new conditions was for them, or that they were already used to working remotely.

Higher productivity

Positive experiencing of home office during the lockdown is connected with perception that remote work is just as efficient as live and productivity even higher. Some report that deep focused work is easier for them at home than in the office.

15% reported that thanks to imposed home office and remote cooperation they have new productive team routines and tools, like shorter meetings, informal catchups, daily standups, more frequent leadership updates and respective tools.

Convenience

One of two main positively perceived personal benefits is saving time (on travel, unproductive meetings, preparations, and random interactions).

Another is convenience in taking care of daily tasks, such as walking the dog, cooking, taking care of kids, cleaning, washing, shopping or workouts. Being able to switch between personal and professional time makes it possible to save money.

Enjoying less social contact

A few respondents mentioned how introverts seem to enjoy and appreciate less contact and less control, and more trust from their superiors.



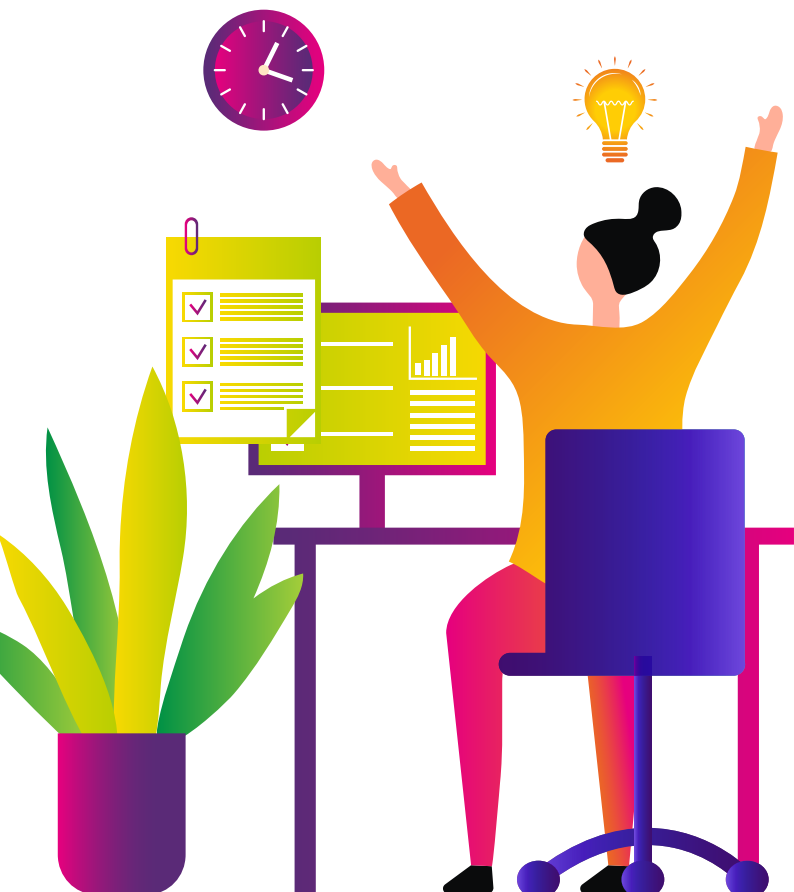
Experiencing Home Office – Positive

117 mentions

Adjusting to new conditions is easy	15
Convenience in taking care of daily tasks	8
Deep focused work easier at Home Office than office	8
Introverts enjoying less contact and less control	5
Remote work is just as efficient as live, productivity even higher	22
Saving time on remote work	13
Used to working from home, no change	17
We have (new) productive team routines and tools	29



Outstanding range of activities, such as morning interactive coffee sessions, Thursday night online quiz events, one to one chats with the office managers and weekly board meetings with our directors. Overall, it feels like this crisis has helped us to know each other better and even share anecdotes about our personal life and families. Company's reaction to the crisis has ultimately allowed us to bond more than ever as a team!



I was surprised about my productivity which is better now – my time schedule is better organized without personal contact.

I even miss wasting my time in the traffic jam :)

And I do a lot of things that I would have to do after work during the day – cleaning, washing, shopping.

I can take better care of my dog.



4. Experiencing Home Office Negatively

Negative perceptions of home office experience during lockdown.

Productivity

Negative experiences of home office primarily concern productivity related themes: feeling less effective was mentioned by 30 individuals (difficulty focusing on remote meetings, problems with concentration or discipline, etc.), harmed creativity and team integration (processes of ideation, sharing, immediate feedback or timely rich communication allowing mental alignment), and work overload for individuals as the price for productivity.

For C-level executives the strongest topics were feeling less effective and distracted by family members, while for senior leaders it was how Home Office harms creativity and team integration.

Practical issues

Practical issues concern missing proper equipment and tools (printer, office chair, monitor, enough room for separate calls, IT policies, dedicated space, scanner, etc.) as well as handling documentation.

Work-life balance

Work vs. family negative impacts include being distracted in work process by family members (functioning along with kids and partners, scheduling and contact) as well as the challenge of handling schooling kids and spending time with them.

Well-being

Well-being related themes are the fourth area of negative experiences concerning home offices. Participants express that Home Office is harmful for health (ergonomics, lack of movement, isolation) or that they are losing the boundary between private and work life (not able to mentally switch between themes, work and privacy mixed in one space, stress from workload w/o. human contact).

27 interviewees expressed they or their team have a wish to come back to office as soon as possible.



Experiencing Home Office – Negative

138 mentions

Distracted by family members (work vs. family)	11
Harms creativity and team integration (quality)	16
How to handle documentation (practical)	3
Lack of management buy-in	2
Less effective (quality)	30
Loosing boundary of work vs. private life (work-life balance)	12
On HO missing proper equipment and tools (practical)	20
Overload for individuals	4
Schooling challenge (work vs. family)	5
Wishing to come back, missing aspects of office life	27
Working from home is harmful for health (work-life balance)	8



Home office can work for short time but is bad in long term, as less productive.

Productivity has risen, because of this situation we had to cover also other positions, so we have more work and we work sometimes till 7pm.

I really miss our office, colleagues and hope to get back soon.

I miss my workstation and social contact with colleagues, brainstorming, face2face discussion, skype does not replace physical compatibility with people.

Weeks of working from home combined with childcare due to closed child care facilities are a big challenge.

The biggest challenge was to find a space in my apartment where I could focus on work.

It happens to me that sometimes I work at 9PM just because the laptop is near me, and this is not good for my work/life balance.

Working from home was harmful for my health: bad chair, lack of physical activity caused some damages to my health which made me more frustrated.

Bad for socialising/internal business relations.



5. More Flexibility at Work

Respondents realised remote work works for them, considering long term change of their operations with more flexible work arrangements.

Main themes:

- In 25 interviews, respondents mentioned that thanks to this COVID-19 lockdown their company realised remote settings work for them and are considering keeping flexible arrangements long term.
- Some respondents have observed that even managers who were hesitant to allow remote work before are now easing up to the arrangements after trying remote management.

The notion that remote work works for selective positions has been represented by all levels of management, most dominantly by C-level.

The notion has also been represented through all our countries.

Trying more flexible work conditions	43 mentions
Management strengthened support for HO arrangements (flexible work conditions)	10
Managers easing up to remote work	8
Remote work works (we realized) and we will continue working from home	25

Definitely we will keep more flexibility for people in remote working.

On the other hand we have realised that even assistants can work remotely.

Before COVID our boss did not trust home offices and now he admits that he is open to trust more than before - and he will allow people to have regularly 1-2 days at home.

What will change is the remote working and online business, as these past weeks showed that it works. This confirms that in the future the more flexible work will be required by all companies, even ours (we even did a full audit of the company on remote).

Working from home will be the new standard.

6. Red Flags in Remote Cooperation

Issues that respondents raised, where remote cooperation significantly changes team dynamic and is perceived as harmful.

Two strongest concerns in connection to remote cooperation are that:

- people need to socialise and share which is not possible in the same quality via home office
- teamwork is changing under remote circumstances (16 respondents), negatively impacting the following areas: missing immediate feedback among team members, impossibility of creative groupwork, inability of rapidly solving immediate problems and exchanging points of view, hardship in sharing and learning from each other, missing cross-team communication.

Further concern is that onboarding and developing junior talent or new joiners is highly problematic in remote settings, since learning through relationships and observation is key.

Practical concerns of few include importance of dedicated work space at home (referring back to negative experience on Home Office) and a risk posed by the fact that intensified stress and pressure is higher and “invisible” when working remotely.

Red Flags In Remote Cooperation	49 mentions
Importance of dedicated workspace at home	4
Intensified work pressure at home is invisible	2
Onboarding and developing junior talent is a challenge	5
People need to socialise and share	22
Teamwork is changing: Missing immediate feedback, creative sessions together, solving immediate problems, exchanging points of view	16

6. Red Flags in Remote Cooperation



In the past we would do most of our business virtually anyway, but lot of things we would solve by just asking a colleague next door which would solve it on the spot.

They are feeling the pressure to prove that productivity is ongoing and that they are able to deliver the results from home. Resulting in even more stress and longer working hours.

Knowledge sharing, learning from each other and training are key elements of cooperation in the team, which was naturally working in one space day by day. Since the full team is working from home, there are obstacles in the process, especially in the junior positions, even though the infrastructure and technology were given from the beginning.

However the presence in the office is key element to the innovation process, brainstorming and productivity and they have problems finding workarounds for this.

There is missing personal contact in the team and team interactivity decreased.

The main difference in teamwork is that we cannot ad hoc show each other stuff and consult, we therefore work more individually with a smaller amount of casual feedback.



7. Business Going Up and Proactive Tactics

Statements describing how companies are doing well or creatively using opportunities, either already having good business results or investing in solutions that will hopefully create them.

Main themes:

- Some companies' business has not been impacted (42 mentions) and some are doing even better than before corona (16 mentions)
- Respondents report the Corona crisis has either created new customer bases (6 mentions) or that it pushed them to create new products and discover opportunities (30 mentions).
- 10 have spoken about decisions to invest into PR, communication or more active promotion of their products and services.
- 19 mentioned that the crisis intensified push for e-transformation and transforming offline to online portfolio.

Business Going Up and Proactive Tactics

123 mentions

Business Going Up and Proactive Tactics	123 mentions
Lockdown created new customer bases	6
Covid-19 crisis created new opportunities, products	30
E-commerce transformation – pushing traditional offline portfolio to online	19
Investing in PR, communication and active promotion	10
Our company has not been impacted	42
Our company is doing even better	16

In March, we laid off 50% of the workforce proactively and changed our core business to digital-only.

Company is doing great as never before. We are hiring staff.

We launched a new product specifically tailored for the crisis and it has kept us in business for now.

They predict that such increased demand will last ca 2 years.

Surprisingly thanks to Corona we did business that would probably never happen or would take a longer time.

As the whole situation and service were new they gained new partners and clients easily, as they had no competitors on the market.

In terms of business, the impact is yet to be seen, but generally it does not seem to have negative impact on numbers.

8. Business Going Down

Statements that describe either a slow down or rapid fall of a business.

Main themes:

- The COVID-19 crisis brought an immediate drop in finance for some of the respondents' companies. 32 interviewees mentioned either smaller income or revenue shares. Further, cashflow problems have been mentioned by 14.
- Gaining resources has also become a challenge since both banks and investors slowed down their communication and decision making. Slowing down can also be visible in internal operations.
- 14 respondents mentioned that parts of their product or project portfolio are declining (have been discontinued or are not relevant currently), 20 have talked about necessary headcount reduction, workload increase or wage decrease.
- Some have reduced supplier contracts or their supplier network is undergoing significant change of structure.

Cashflow problems have been dominantly mentioned by small companies.

Business Going Down	107 mentions
Cashflow problems	14
Drop in finance (smaller cashflow/revenue/share)	32
Gaining resources slowing down (banks, investors)	5
Necessary headcount reduction or increased workload or wage decrease	20
Operations slowing down	20
Parts of product or project portfolio declining	14
Supplier contracts reduced or and network undergoing significant change	2

8. Business Going Down



Threat of secondary payment inability (clients cannot pay for invoiced work).

They are seeing a significant drop in revenue but they will survive if we can start going back to work in the next 3-4 months.

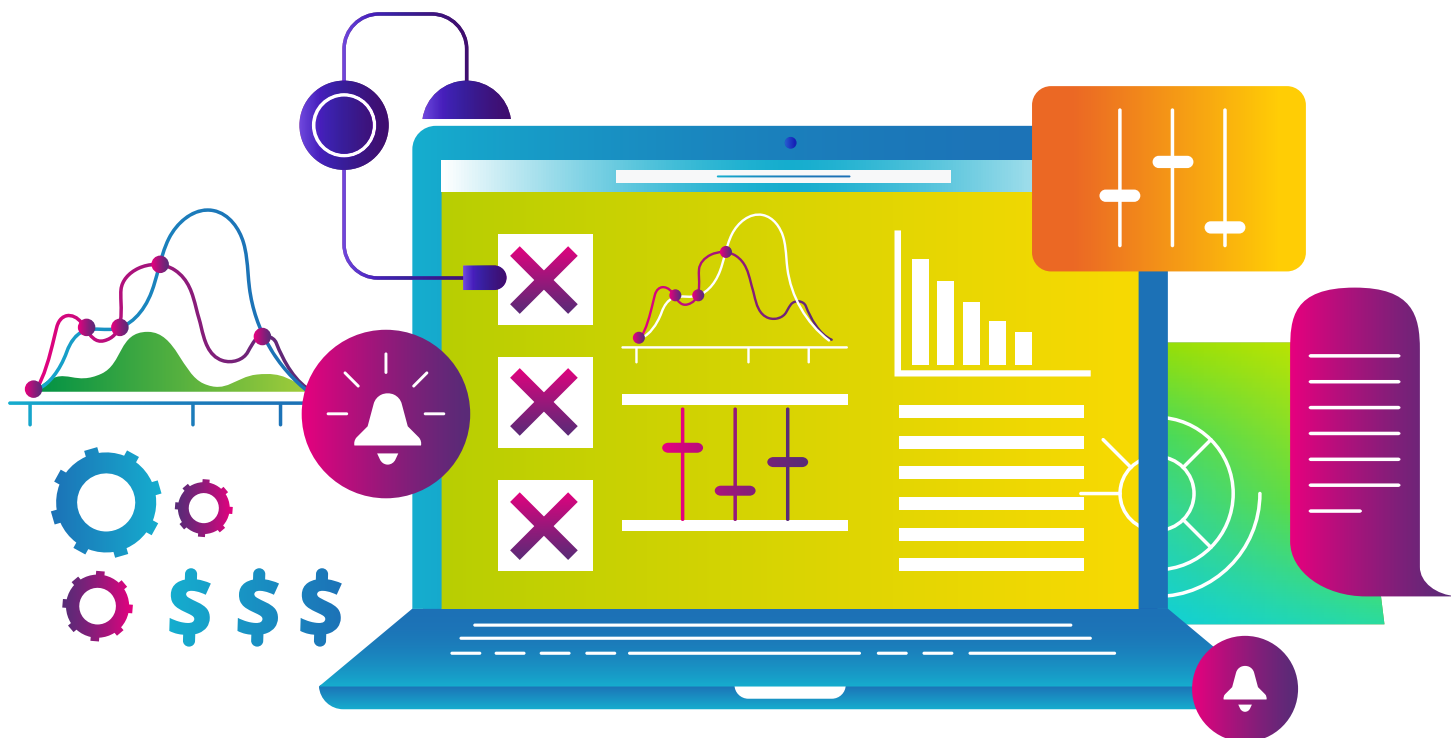
At the beginning, we were influenced by banks being slow.

I am afraid that operating costs and fees won't allow us to stay on market.

Most of our clients and projects are from abroad, so this is a huge challenge for us as we cannot travel and continue with our projects. Most of the time we work remotely, so we might actually struggle to survive.

Losses: ending of several contracts, end of growth, we had to terminate several contracts with employees.

It's now difficult to communicate with investors, the communication is slow, because no one is sure, what to invest in, what pays off. So there are more issues with investor cash flow.



9. Problematic Sales

Statements that describe changes in sales regarding client behavior, as well as changed dynamic of contact between sales forces and clients, presenting a challenge.

Main themes:

- The most mentioned theme in this category is that business has generally slowed down, while there are generally fewer demands from clients and it is more difficult to acquire new clientele. All forms of decline include fewer projects, smaller scopes, slower decision making, delays, and trouble establishing new cooperation.
- 15 interviews included the topic of sales forces getting out of touch with clients and client needs due to remote communication. Not seeing each other weakens existing relationships, weakens informal exchange of information and creativity in sales and makes first contact more difficult.
- Some commented that they expect continuous slow down in new business and some commented on retail business close down.

Problematic Sales	52 mentions
Classic retail closed down	5
Expected business slow down	6
Sales force getting out of touch with clients and their needs resulting in slower business	15
Slow down of new and existing business, less demands and reduction of new projects	26

Clients' decisions are prolonged.

It is surprising how much the requirements of clients downgraded.

Shrinking or at least stagnation of existing business, almost no new business, lot of worries about the time of sector recovery both for public and private customers.

One of the biggest issues are related with the sales force staying at home and not being able to visit customers, with limited possibility to conduct consumer testing or some e.g. TV shooting.

You may perform lots of tasks online, but the majority of our business is really meeting clients in person, negotiating in person and I think we are losing touch with the real needs of the clients, while remote.

Local clients - frozen projects, global clients - ongoing as usual, no new clients or briefs, budget cuts in field of marketing f.ex. on daily basis we managed fb accounts and now some clients resigned and try to manage it on their own.

All major projects where decisions are needed are suspended.

10. Future Business Considerations

Business decisions and interventions that companies consider taking in near future.

Main themes:

- Strongest voice in the category were 22 respondents expressing that direction of their business is unknown due to covid related uncertainty and unpredictability.
- Considered decisions include changes to budget (creating floating budgets or rescheduling).
- Some companies have reconfirmed their long term vision as unchanged with minor updates, while there is also intensified push on online portfolio and online sales as well as search for disruptive innovation. Respondents also talk about quickly learning new skills under pressure which they plan to utilise and believe will help them in the difficult circumstances.

Most comments about unknown direction come from specialists rather than leaders.

Future Business Considerations	57 mentions
Changes to budget: Rescheduling, floating timing, cuts	6
Direction unknown: uncertainty and unpredictability	22
Intensified search for disruptive innovation	7
Planning to utilise new skills gained under corona pressure	5
Push on online portfolio and sales	15
Reconfirming long term visions with new twists	2

Future: not clear at all.

It is really hard to say at the moment, but I think we will try do diversify the sources of income, as the management is struggling to adapt the strategy to new circumstances.

In call centres some of the people have been trained to do some other agenda so that they can be really helpful to clients and ease some pressure we had in first days of lockdown when people really worried about their money in the bank.

More online sales for sure. We need to have our products offered online.

We think that in the future we will keep a special buffer for next years budgeting. But what will show is second wave of the covid in autumn, should the second wave come, the budgeting will be different, rather floating, ad hoc, not fixed to quarters etc.

The shift of a business model - urge for new revenue streams.

11. Future Hopes and Beliefs

Category aggregates statements where respondents describe their own personal beliefs, hopes or assumptions about future.

Main themes:

- Reality will push us to do things more effectively
- We will consider each decision more thoroughly
- Market will restructure
- There will be less travel and flights
- Lockdown will have mental health consequences
- Unemployment will rise
- Things will get back to the same shape as before Covid vs. things will never be the same

I believe it will be an impulse for doing things more effectively.

It's been a good time to partially reset and re-asses our internal systems and processes to maximise team efficiency and output to our clients after a period of high growth.

They predict that companies will be more careful with investing in new projects or innovation.

Or on the other hand the clients will figure out that we are able to deliver projects from Slovakia without necessity of flying to other countries, but by working remotely.

This covid situation on the markets will create a merges and consolidations, smaller and weaker companies would have to sell or leave market, that we will be the ones investing and expanding, thus fulfilling the company's vision to expand to other components fields. We believe that not within weeks or months, but probably during the next year we shall be on the numbers as we were before Covid.

12. Ideas

Ideas concerning office life and solutions that our respondents have mentioned.

- Feet door knobs
- Antibacterial materials (copper, tin, silver)
- Rethink lifts, toilet, HVAC
- HB facilitating food delivery
- Coffe in lobby
- Measuring temperature in lobby
- Market concierge to limit interactions
- Pandemic-free building certificate

I don't know why door have no doorknobs for feet. I have been thinking about this for a long time, but now it's more relevant.

The other think we are discussing is what will happen with the buildings. We now have green certificates, are any hygienic/ pandemic free certificates coming.

Maybe we could make a return of naturally antibacterial materials, like copper, tin, silver...

... twice daily temperature checks of all staff.

What to do in the longterm: other than what was mentioned above, also consider how to market concierge as a service that allows people to have fewer interactions."

13. Worries

Future related worries expressed by respondents.

- To come back to the office
- How close desks are
- How will office life work with new safety requirements?
- Air conditioning
- Sitting in a mask all day
- Isolation
- Distancing
- Everyone keeping hygiene
- Business center kindergarden
- Safety of public transport
- Staff reductions
- Not enough work



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