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IT EVOLUTION:

**HOW THE PANDEMIC IMPACTED
THE WAY WE CHOOSE AND USE
TECHNOLOGY TODAY**



The power of technology — and our reliance on it — has never been more evident. Companies are investing in new technology, migrating from older solutions, and embracing digital transformation as remote work continues to dominate around the world. Every day, COVID-19 is not only changing how people work but how they source and use technology to work better, faster and smarter.

Earlier this year, TRUE Global Intelligence, the in-house research practice of FleishmanHillard, set out to better understand the impact of the pandemic when it comes to business decision-making, especially in terms of Information Technology (IT). Where are businesses investing, who is making the decisions and where are they getting information in a largely virtual world free of in-person demos and large-scale tradeshows?

More than half of the 452 people surveyed believed the COVID-19 pandemic drove organizational efficiencies, with three in five (57%) noting the pandemic improved the decision-making process around technology investments. When it came to communications, decision makers agreed that industry experts, IT forums/blogs and tech publications are more influential than social posts. Respondents also said that addressing diversity, equity and inclusion will be top of mind as businesses continue to face a litany of change and challenge.

While the pandemic may have altered the DNA of business forever, there is a huge opportunity to emerge stronger than before — using the lessons of the past year to better understand, assess and ultimately make the choices that define organizations around the world. There is a lot of potential in the path to recovery.



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Introduction

The pandemic accelerated development of blockchain and AI and increased our overall dependence on technology in daily life. Further, more than half of those surveyed believe the COVID-19 pandemic drove organizational efficiencies, with three in five (57%) noting the pandemic improved the decision-making process around technology investments; many say they have managed to implement a quicker turnaround time on buying decisions.

91%

**OF OUR SURVEY RESPONDENTS
BELIEVE THE TECHNOLOGY SECTOR
WILL CONTINUE TO GROW IN 2021.**

Increased flexibility and adaptability were also listed as major changes to organizations in 2020.



Changes related to the pandemic are driving this growth...

- Many surveyed directly cite the adoption of remote work due to the pandemic as a huge opportunity for innovation.
- This is largely spurred by consumer and industry demand for new technology to support the mobile workforce.
- Technology is constantly expanding, changing and improving to meet evolving needs as the pandemic continues – and pointing to ongoing sector growth.

"Technology is continuing to evolve through the pandemic as we adopt to new norms."

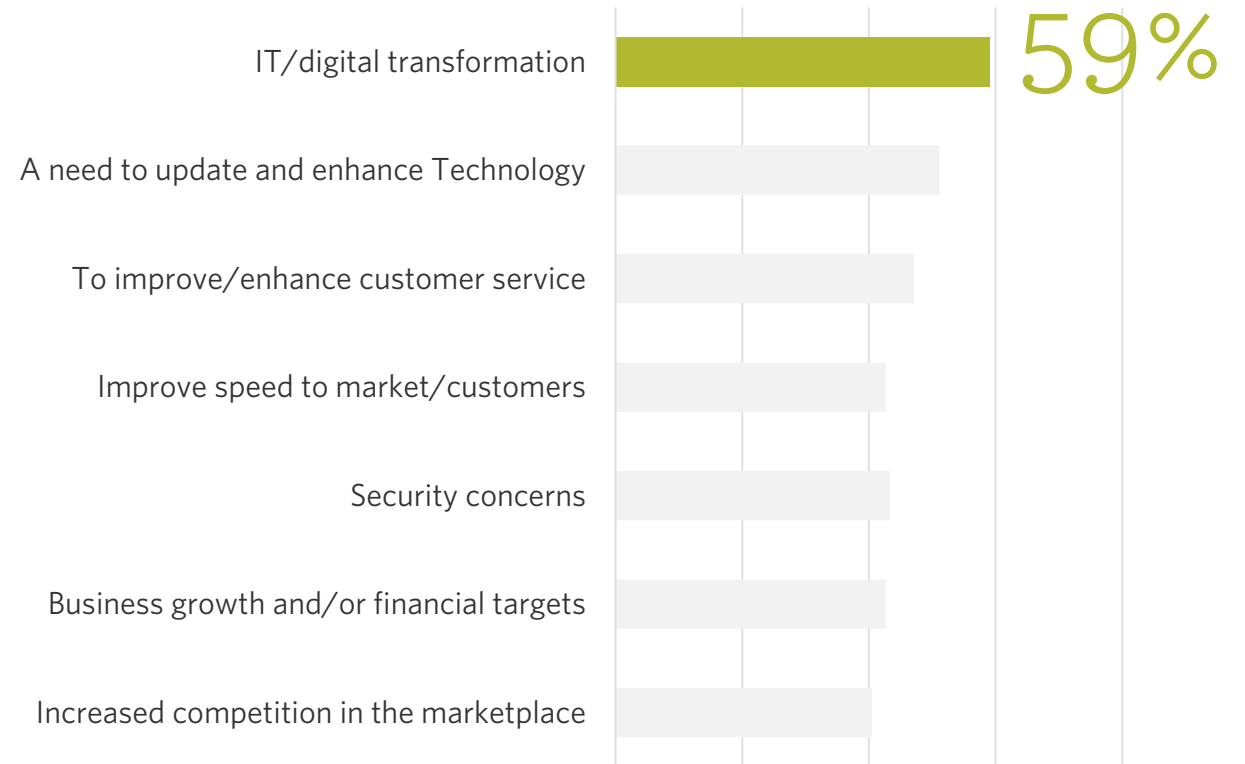
"Because most industries depend on information technology and artificial intelligence – which must be developed in order for yields and production to increase and the American economy to grow – our government will definitely develop information technology for the sake of the economy."

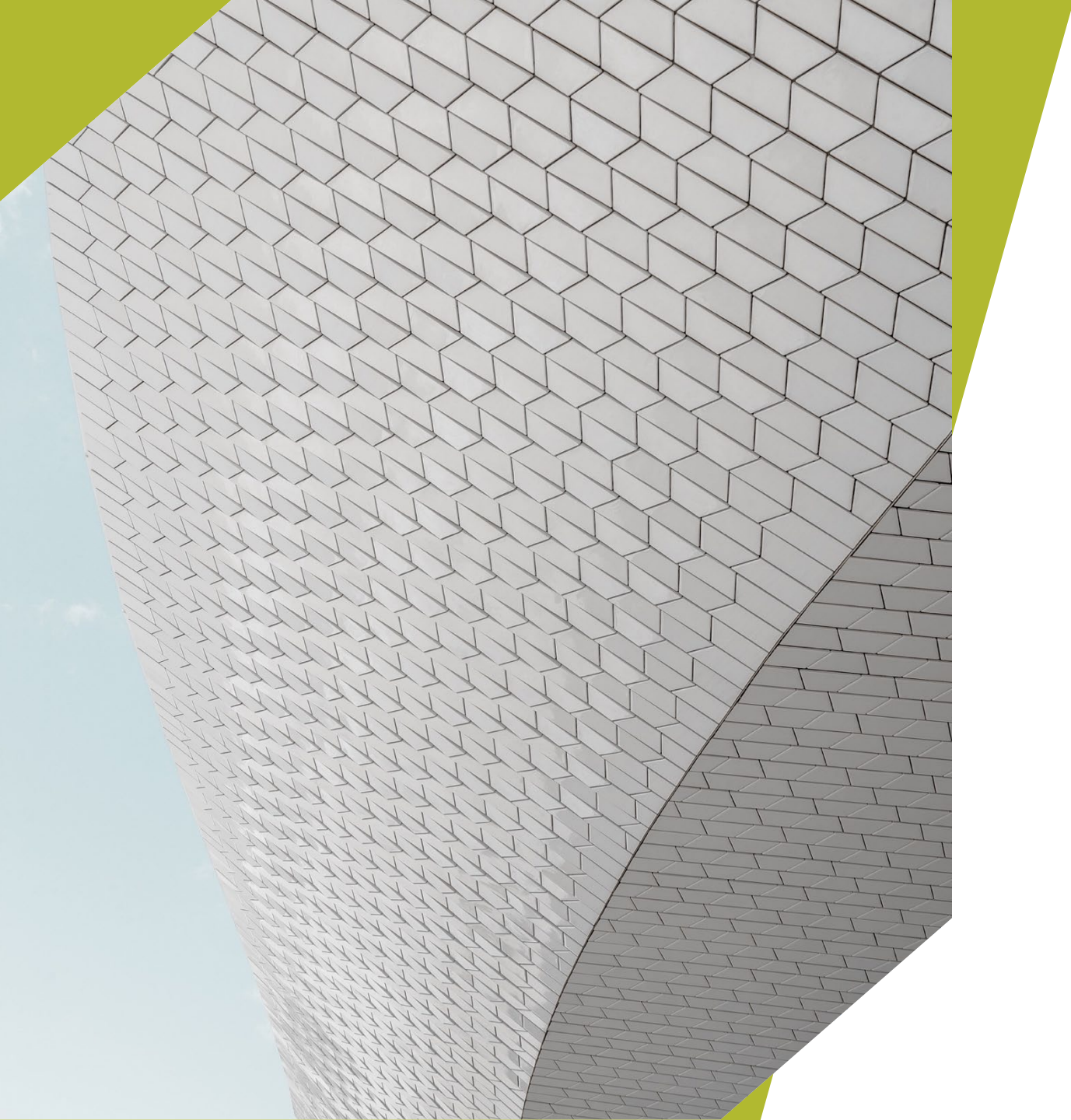
"There are tremendous improvements in data-fluency flooding the market. More than ever before we can make intelligent decisions on data-pipes and hand these insights to our clients. I'm aware that many people are becoming blockchain professors, but the truth is that the blockchain is likely the single-largest technology advancement since the steam engine. I am not being rhetorical. The blockchain has revolutionized our industry."

It's not surprising, but *Digital Transformation* is forcing technology purchasing decisions, with more than half of respondents saying it drove them to change.

Overall customer service and concerns around security were among the other areas of consideration.

Typical Drivers for Purchasing Technology Products/Solutions
Of total (n=452)

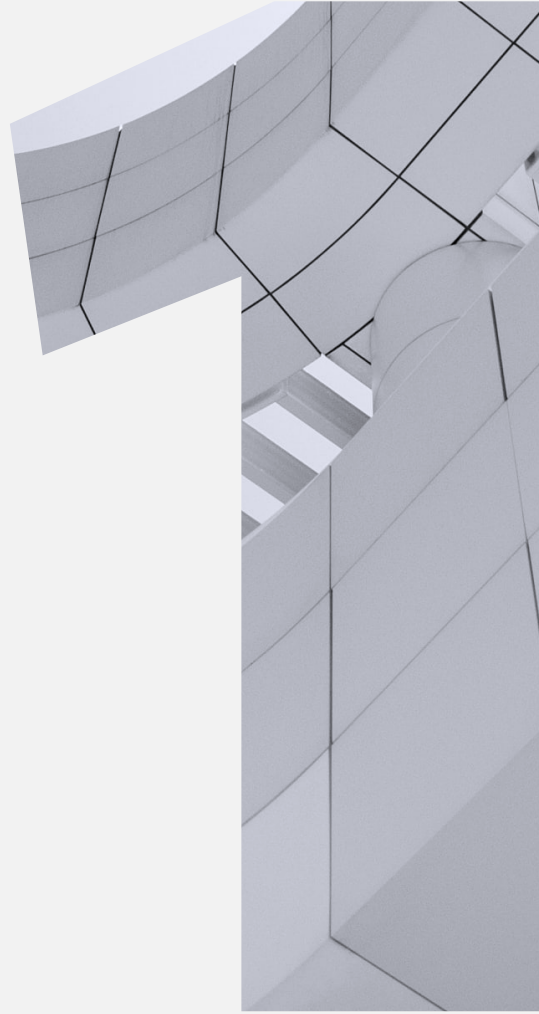
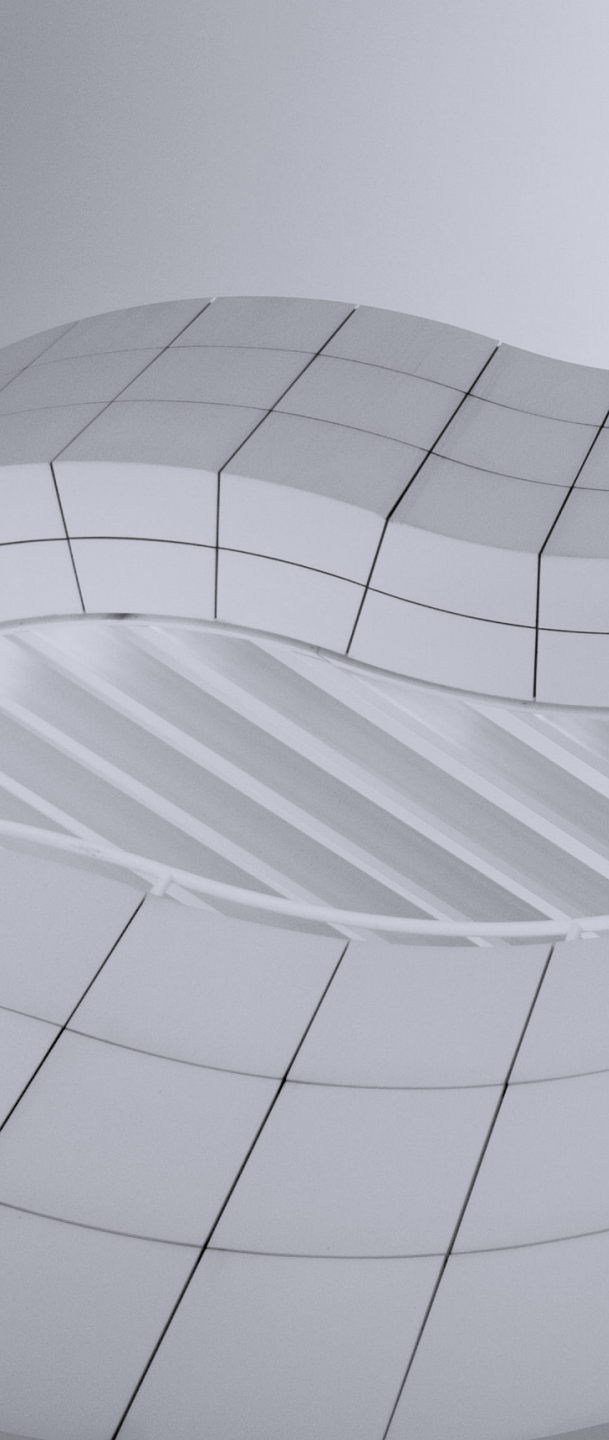




But what is really driving companies to change their IT providers and solutions in the time of COVID-19? Who is making these decisions and how are they being informed?

Ultimately, technology adoption and bottom-line improvements appear to be less important than improved performance and increased productivity ... and third-party validation is key.

LET'S TAKE A CLOSER LOOK.

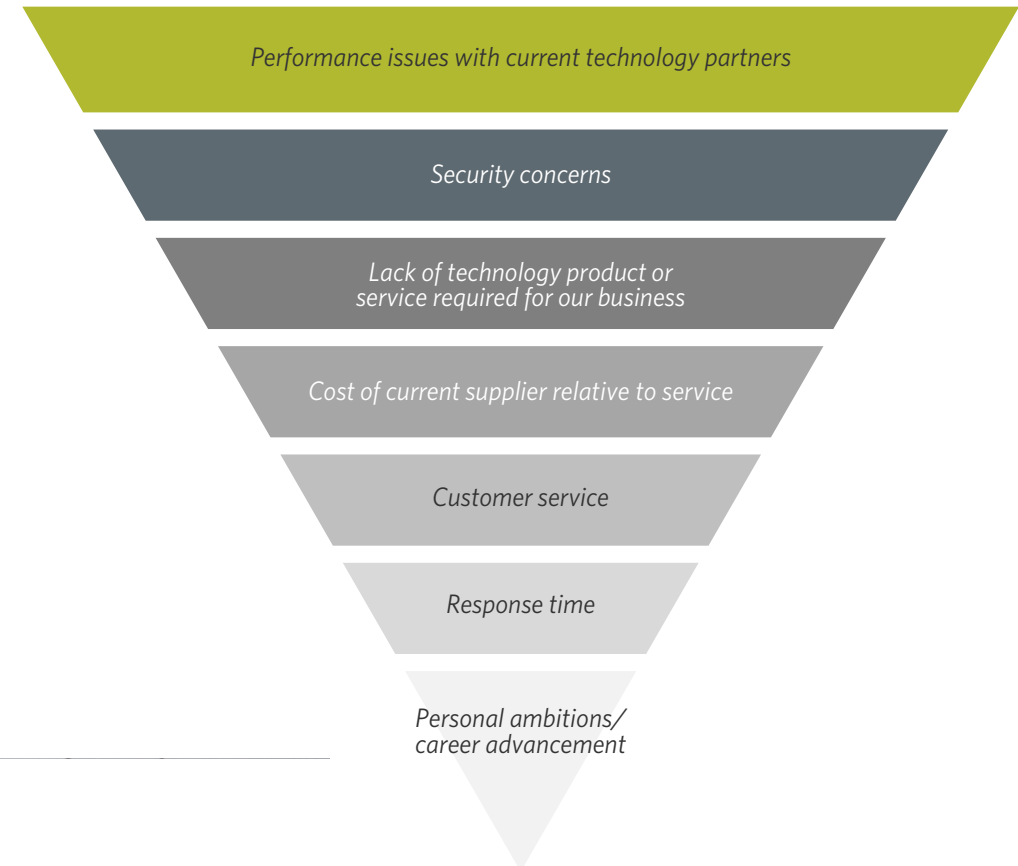


What Does
the IT Buyer's
Journey Look
Like Today?

Why are brands switching to new providers to power their pandemic-driven transformation efforts?

Undertaking digital transformation doesn't require a new partner or provider, yet many companies are making a switch. Almost all our respondents cited basic performance issues, security concerns and simple lack of offerings as the actual drivers for changing their provider. Most people are in it for the business – change is not about personal ambitions or advancement. And that's good news, considering it's a massive undertaking.

Typical Drivers for Changing/Switching Technology Providers *Of total (n=452)*



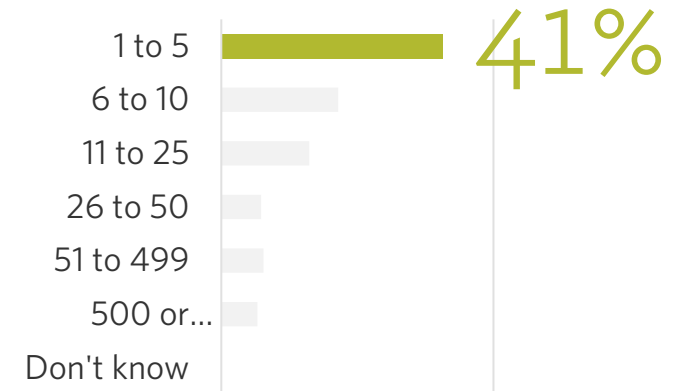
Who is making the decisions and how long is it taking?

Once the decision to move forward on a change is made, the actual process is fairly streamlined: 62% of respondents indicated that the number of people typically involved in purchasing technology products or solutions is between 1 and 10. And 88% of respondents say the typical length of time to purchase a new technology product or solution is *six months or less*.

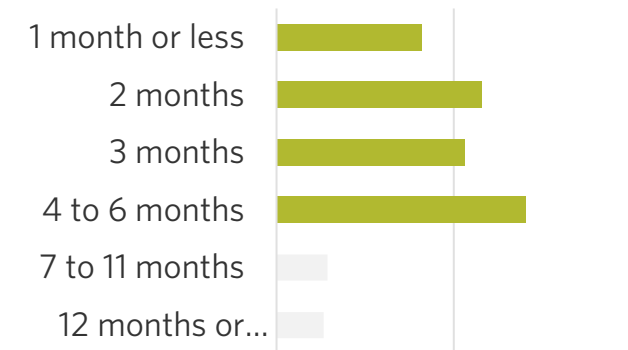
Nearly three quarters of respondents indicate that IT was the most involved in the technology purchasing process. However, broken down by vertical we saw some new players in the mix:

- For those in the manufacturing industry, for example, the HR and operations departments were more involved than in other industries.
- In the finance industry, finance/procurement were significantly more involved compared to other industries.

Number of People Typically Involved in
Purchasing Technology Products/Solutions
Of total (n=452)



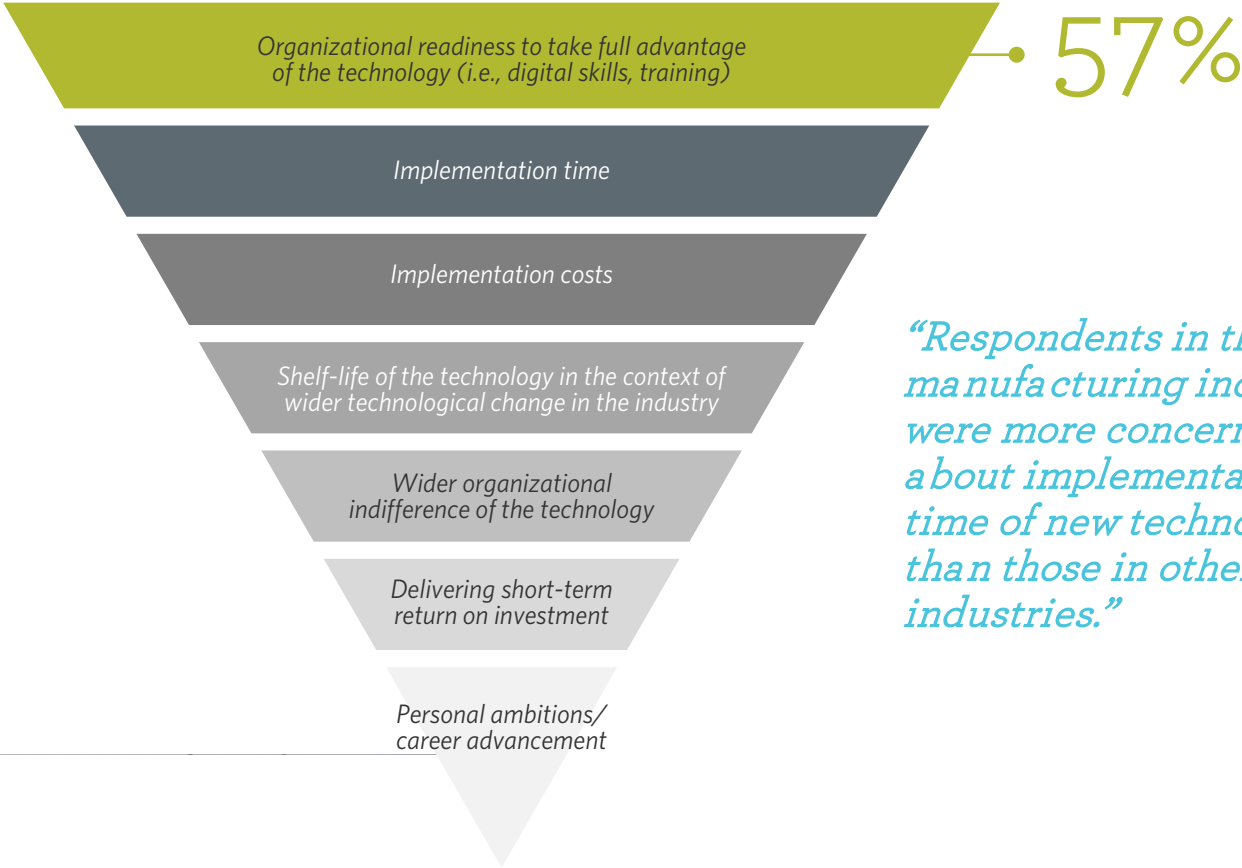
Typical Length of Time to Purchase a
New Technology Product/Solution
Of total (n=452)



Digital transformation is imperative for business success, especially in today's environment. But that doesn't mean it will come naturally – even if all the key stakeholders agree to the investment in principle. From initial development and migration to training and formal rollouts, the act of migrating and implementing can be a daunting thought. More than half (57%) of respondents find organizational readiness, implementation time, implementation costs and technology shelf-life as their biggest personal worries and concerns.

Biggest Personal Worries and Concerns When
Making a Technology Purchase Decision

Of total (n=452)



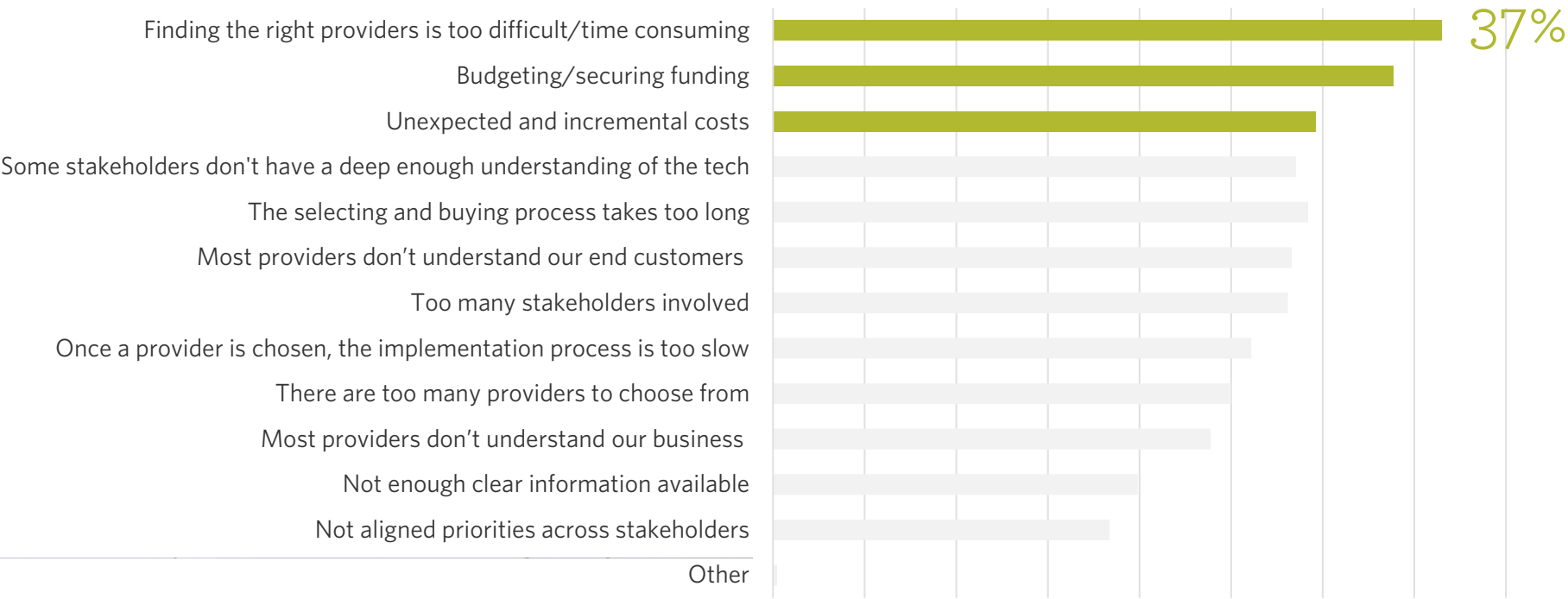
“Respondents in the manufacturing industry were more concerned about implementation time of new technology than those in other industries.”

What are the most common worries and concerns when making these purchase decisions?

What slows down the decision-making process?

One would think that once a company has decided to officially make a change, the selection process should be easy. They know what problem they want to solve and can shortlist providers. It turns out, the hunt can be as big a headache as the problem they are trying to solve. In fact, 37% of respondents saying that finding the right provider is difficult and time-consuming. Other significant pain points are related to costs and funding.

Biggest Pain Points During New Technology Buying Process
Of total (n=452)

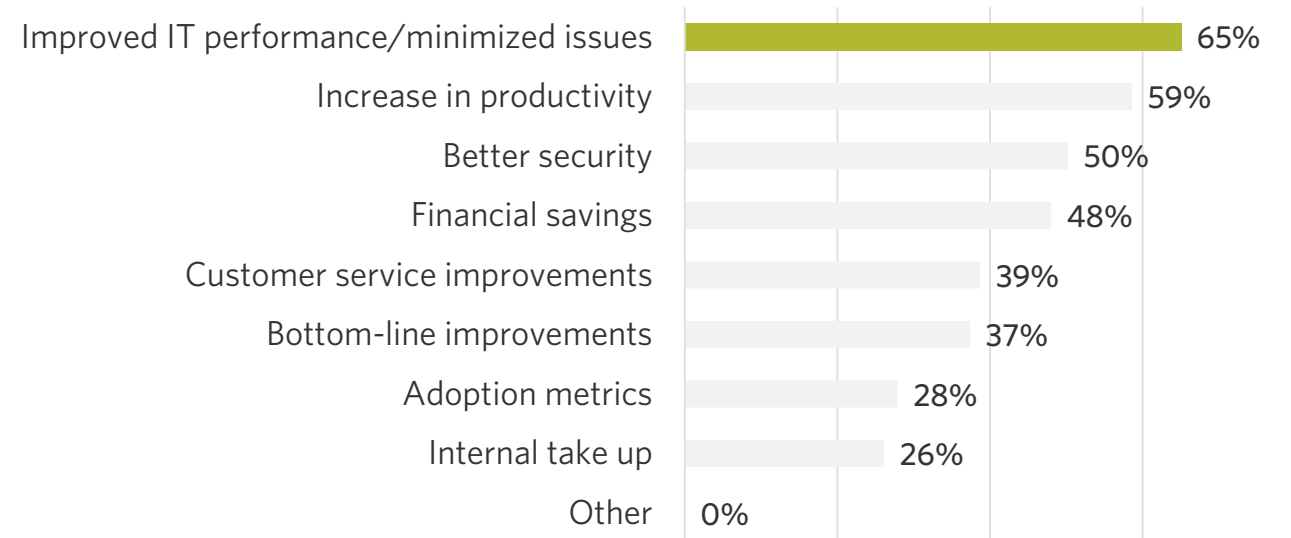


Once a company has gone through the process and made the change, how do they determine ROI? Tech adoption and bottom-line improvements are less important than improved IT performance and increased productivity. Half or more say minimized IT issues, increased productivity and better security are the most important metrics for determining a new technology's ROI.

How will companies measure the success of a new deployment?

Most Important Metrics for Determining ROI of New Technology

Of total (n=452)





How Do You Transform Content to Meet the Needs of These Buyers in a Digital-First World?

Influences on purchasing decisions: it goes beyond the tech itself

We've already established that remote working has had a significant impact on purchasing decision-making. Fewer people are involved, but the process is still time-consuming and stressful. As communicators, our job is to help simplify this process. Key findings include:

- Overall, decision makers think B2B content is boring, predictable and repetitive, and many think online branded content lacks credibility.
- Product/service information and industry or analyst reports are considered most helpful when selecting a supplier, much more so than social media or other new channels.
- Most (83%) respondents find industry experts/influencers influential in the decision-making process.



Technology decision makers want clear, relevant information and quick responses to their questions. While content and customer service reign supreme, it's important to note that even with Covid-19 related precautions, in-person demos and tradeshow remain important. In fact, demos are considered more influential than free trials. Interesting to note as we develop strategies for brands to reach their B2B buyers.

What tools or resources are IT buyers going to for information on providers or suppliers?

Most Influential Supplier Tactics

Of total (n=452)



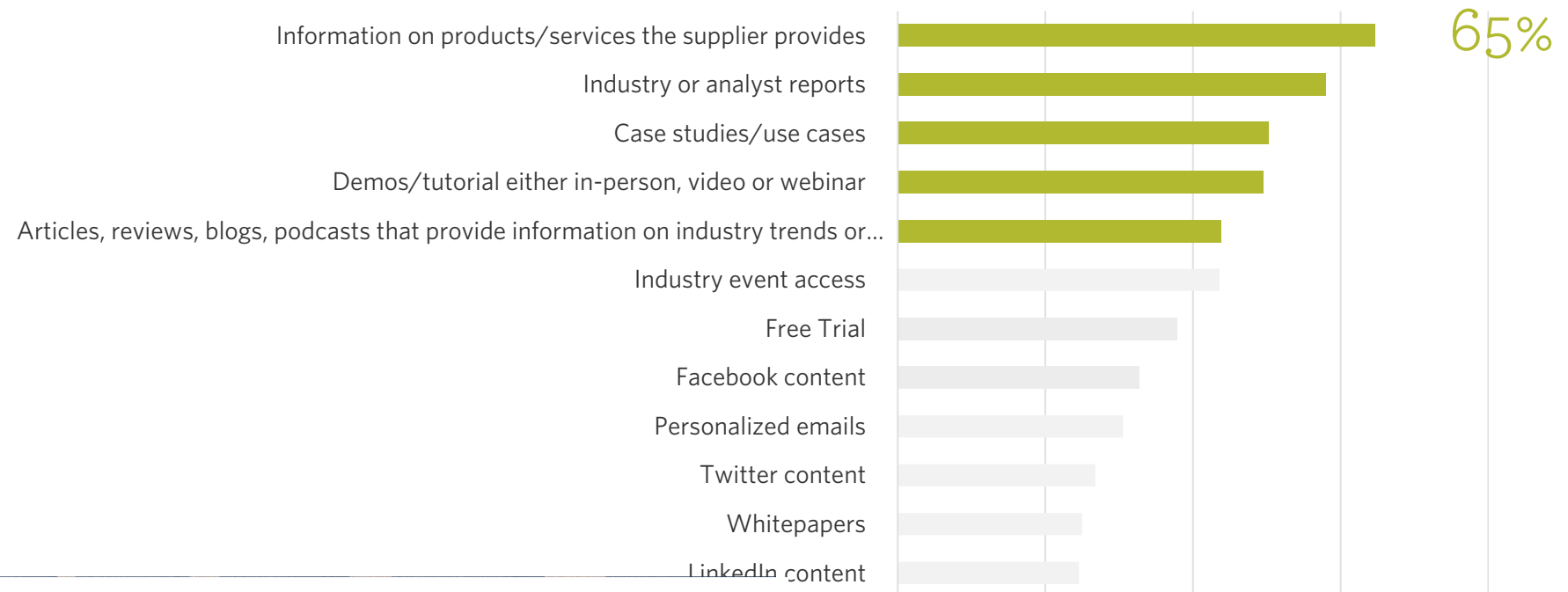
What kind of content are these buyers really looking at?

Proven data and third-party validation are key. Respondents cite product/service information and industry/analyst reports as most helpful when selecting a supplier. Social media content, emails and whitepapers tend to be the least helpful.

Most Helpful Supplier Tactics or Marketing Materials When Selecting a Supplier

Of total (n=452)

Ranked top 5



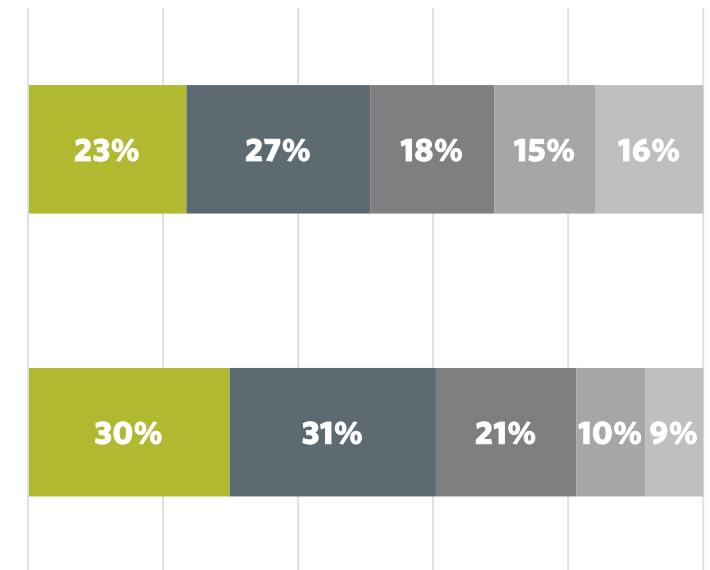
Is today's B2B or branded content engaging and effective?

Yes, content is king. But IT/B2B buyers think suppliers have a long way to go when it comes to owned content – that exact information on products and services they deem critical in the decision-making process. Half (51%) of decision makers think B2B content is boring, predictable and repetitive, while 60% think online branded content lacks credibility.

Level of Agreement: Content Of total (n=452)

■ 5 - Completely agree ■ 4 ■ 3 ■ 2 ■ 1 - Completely disagree

Most B2B content I see is boring, predictable and repetitive



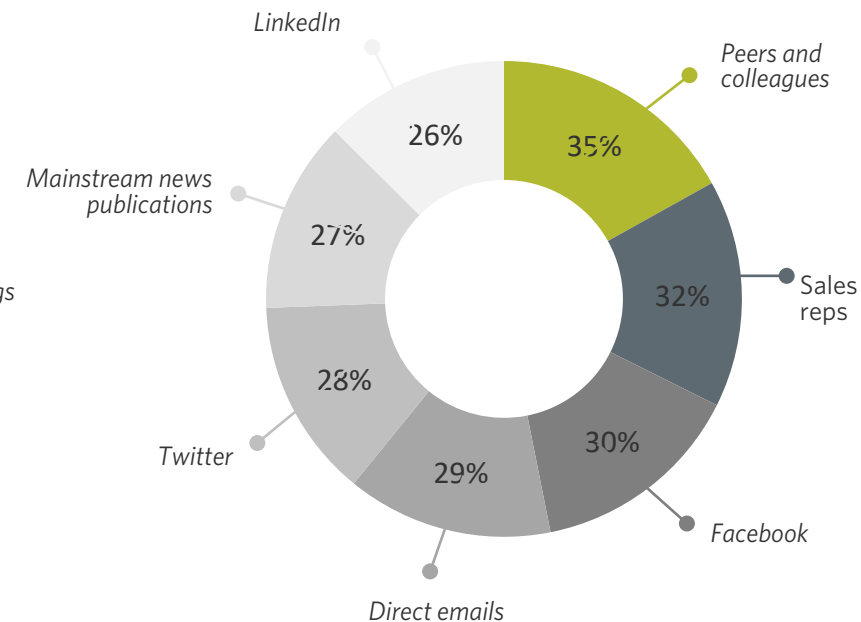
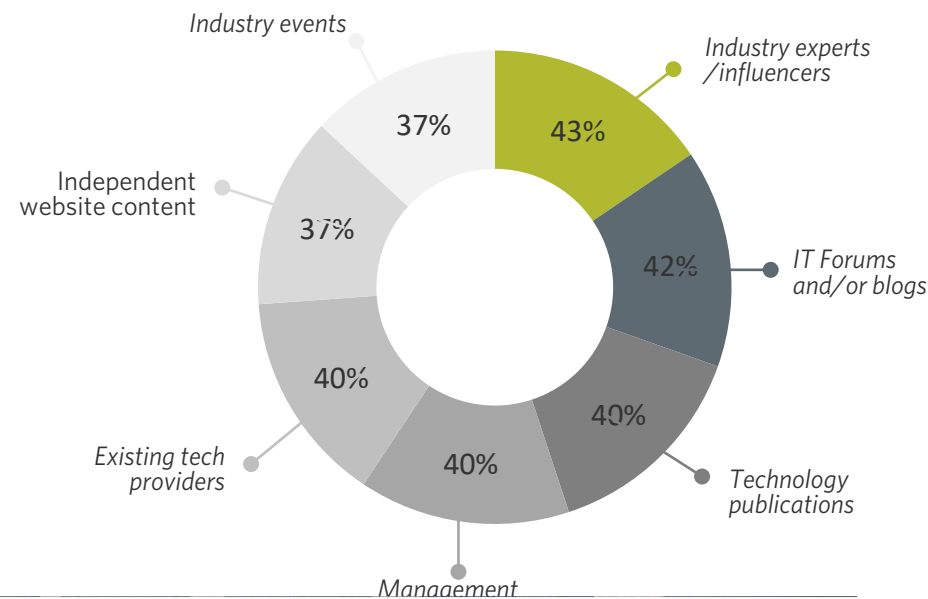
A higher percentage of respondents in the manufacturing industry "completely disagree" that most B2B content is boring than respondents in other industries.

And what channels or sources are the most important?

Most view industry experts/influencers as the top source in the decision-making process. It looks like buyers are also more likely to read a technology publication than a mainstream news outlet when they are trying to find more information on a potential provider. Finally, social media channels appear less influential than industry-specific channels (outlets, forums and or/blogs).

More respondents in the finance industry rated management consultancies as very influential than those in other industries.

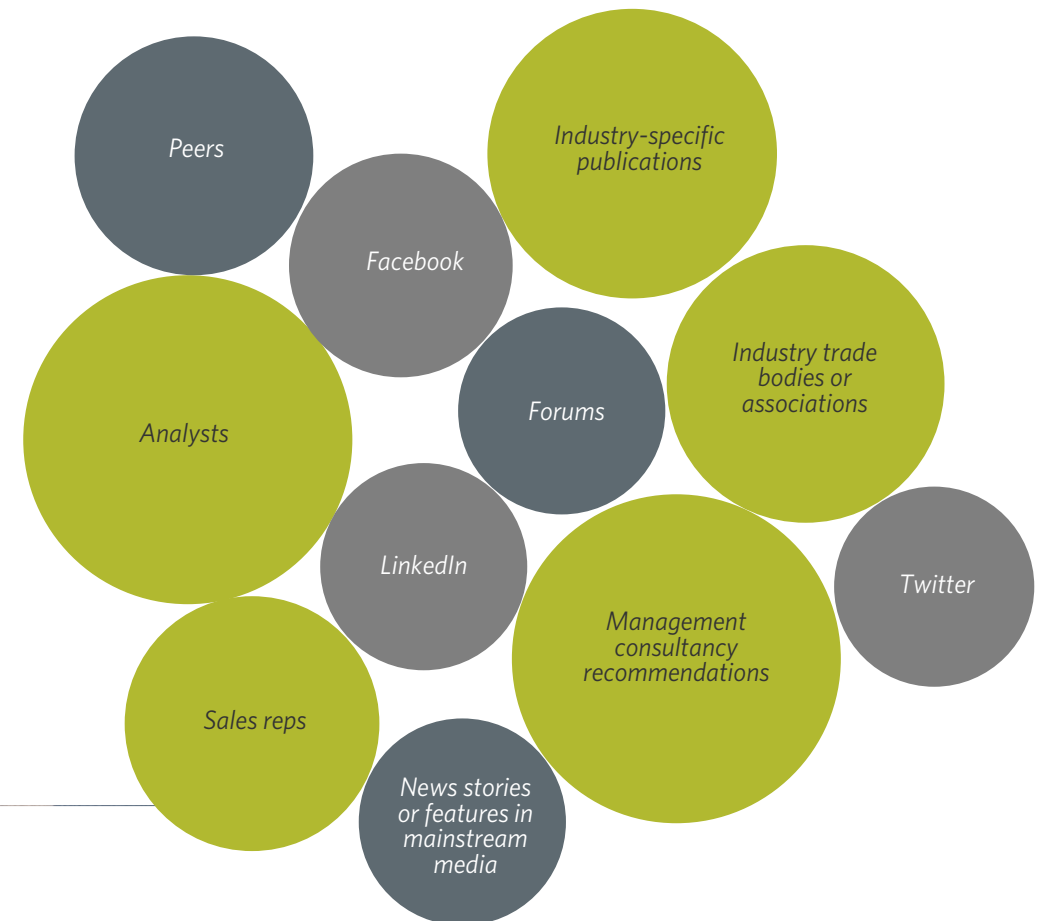
Channels: Rated very Influential on a Company's Overall Technology Purchase Decision-Making Process Of total (n=452)



What about the impact of specific influencers/groups on the IT buying decision?

Proven data and third-party validation are key. Respondents cite product/service information and industry/analyst reports are considered most helpful when selecting a supplier. Social media content, emails and whitepapers tend to be the least helpful.

Level of Influence on Company's Purchase
Decision-Making Process
Of total (n=452)





So What Does
it *All* Mean?

Lasting impact on B2B buying from the pandemic

The pandemic and subsequent changes to how we do business are also impacting how companies learn about, choose and implement new technology. And we don't see this changing any time soon.

A majority of respondents agree that remote working has significantly changed purchasing decision-making forever, including increasing the influence of social media. With more people conducting business virtually and engaging with clients and customers online, instead of meeting face-to-face at a store or in a business/sales meeting, online channels are becoming increasingly influential in reach and moving sales through the funnel.

Marketing, communications and content need to adjust to better support the broader business in this new environment.





A few key things to keep in mind as companies engage with their B2B audiences in these new environments:

1. *Go to your audience* – Don't wait for them to come to you. Tailor messages and communications to drive the interest of key influencers, thought leaders and vertical industry channels.
2. *Cut complexity and demonstrate value* – Nothing matters more today than speed of deployment and ROI. Communicating these values front and center will catapult you to the top.
3. *Make it interesting!* – B2B content doesn't need to be boring. In our increasingly digital world, make sure you stand out or risk being left behind. Use more video and interactive features, integrate purchase functions to make shopping easy (i.e., B2C) and have some fun!

Methodology

TRUE GLOBAL INTELLIGENCE, the in-house research practice of FleishmanHillard, fielded an online survey of technology decision makers in the United States from January 8-15, 2021.

Respondents were required to:

- Have a title of C-suite, VP, GM, president, VP, director, manager or supervisor.
- Have an influence in business decisions regarding the purchasing of enterprise technology products/services for their department or company.
- Work for a company with average annual turnover of \$2 million or more.

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Sample Size

U.S. TOTAL	452
Northeast	115
Midwest	108
South	119
West	110

Sample Size

KEY INDUSTRIES	
Banking/ Financial Services	81
Computer Hardware /Services/Software	108
Manufacturing	68