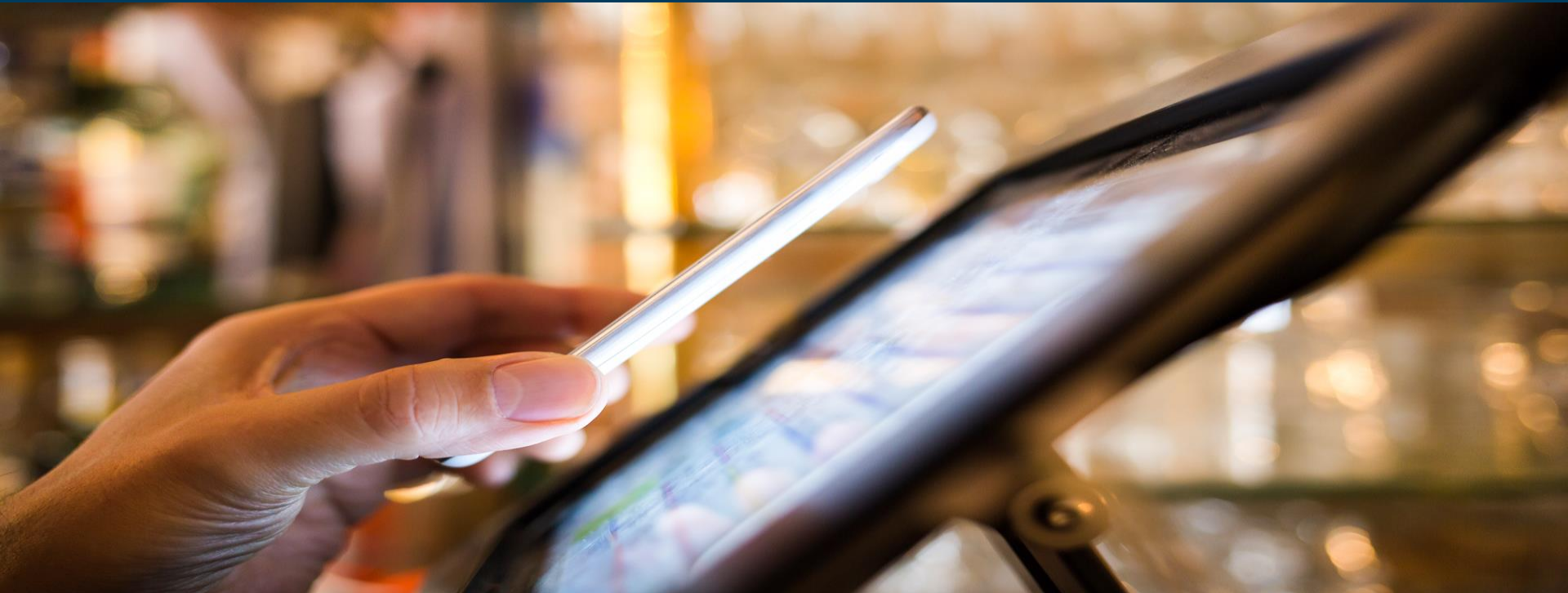


Forrester Opportunity Snapshot: Dell

# Harness Digital To Modernize Education

GET STARTED ▶



# Harness Digital To Modernize Education

## OVERVIEW

## SITUATION

## APPROACH

## OPPORTUNITY

## CONCLUSIONS

## Modernizing Digital Technology In Education To Deliver Exceptional Experiences

The advent of digital technology has impacted every facet of society and is now an integral part of how consumers, enterprises, and public sector organizations interact, work, and access information. The Education sector is no different. New and powerful digital technology is driving major changes in how students, teachers, administrators, and participants in the education arena teach, learn, and interact with each other and with their environment.

### PROJECT BACKGROUND

In March 2018, Dell commissioned Forrester Consulting to conduct a study to determine how workplace technology has effected education institutions. Traditionally, IT departments have controlled the technology purchasing process but with the digital age, students, teachers and even parents are beginning to get involved. To flourish, higher education institutions must equip their staff with the right tools and technologies to empower their staff to deliver exceptional experiences. In this study, Forrester conducted an online survey 420 key decision makers involved in influencing strategic education strategies in Canada, UK and the US.



#### Country

- Canada: 15%
- UK: 26%
- US: 59%



#### Education Institution Type

- Higher Education: 51%
- Primary/K12: 49%



#### Job Role

- IT Director: 26%
- IT Manager: 23%
- Dean/Principal/Teacher: 43%
- Head of Department: 8%



#### Responsibility

- Final decision maker: 46%
- Part of a team of decision makers: 38%
- Influence technology decisions: 16%

# Harness Digital To Modernize Education

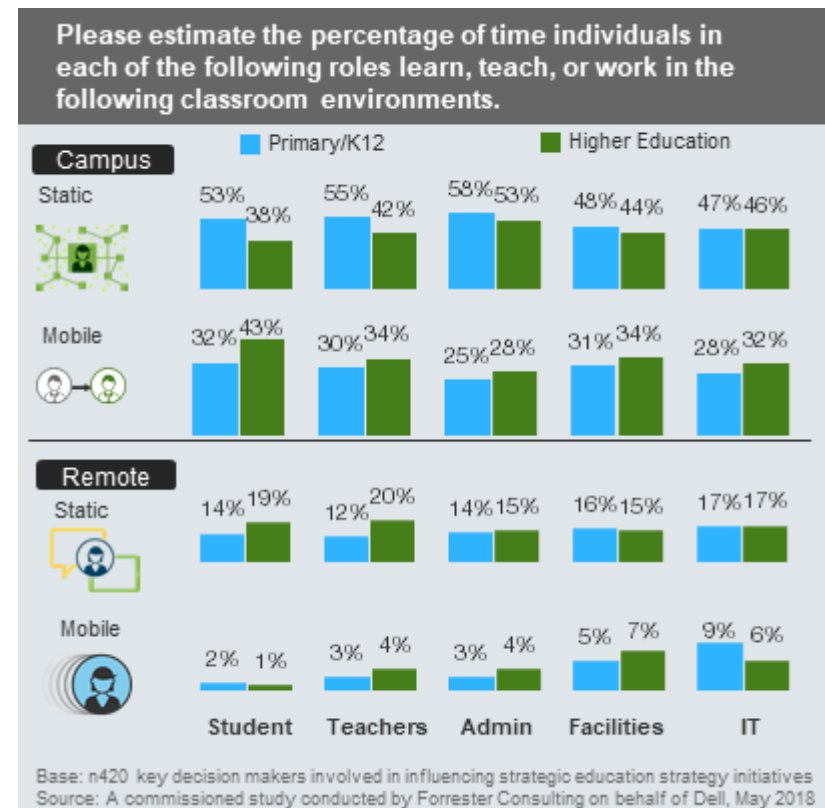
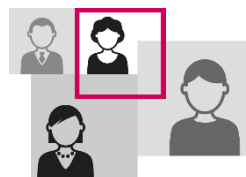
1 2

## On-Campus Technology Infrastructure Is Critical Today And Tomorrow

Education stakeholders are developing digital strategies and new technology to empower students, teachers, and administrators. These digital initiatives transform how education stakeholders teach, learn, and interact with each other and with their surrounding environment.

The intense use of campus facilities by students, teachers, admin staff and facilities personnel, highlights the critical role of technology infrastructure on campus. Today's learning environment is primarily an on-campus experience, however, many education institutions aspire to provide students and staff with remote location support too..

Education stakeholder needs can vary significantly. Key factors impacting education technology requirements include: the amount of time stakeholders spend in classroom environments, role of the education stakeholders, and the type of academic institution.



# Harness Digital To Modernize Education

OVERVIEW

**SITUATION**

APPROACH

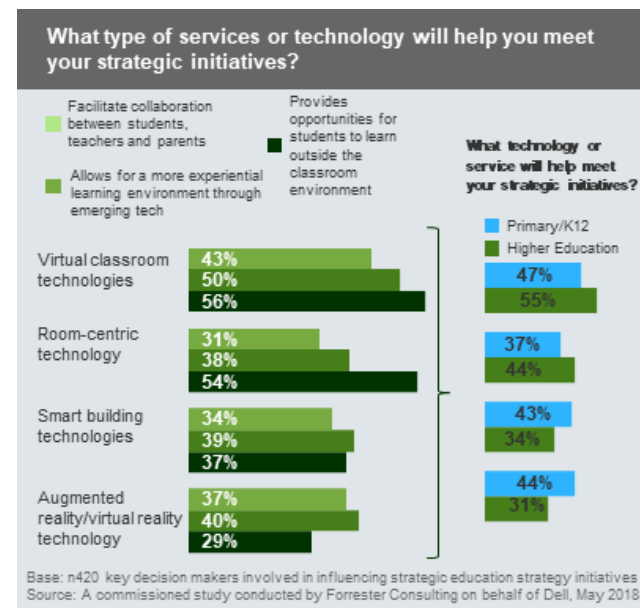
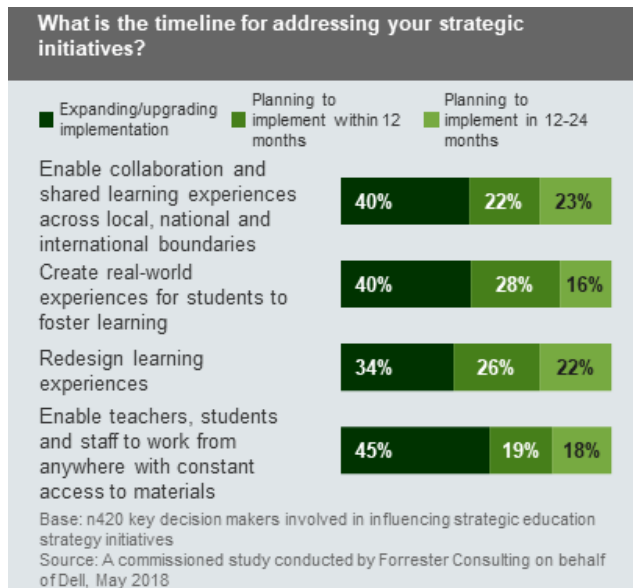
OPPORTUNITY

CONCLUSIONS

1 2

## Technology Infrastructure Underpins Efforts To Enable Digital Remote Experiences

Educators value the experiences powered by technology, and understand that providing students, staff, and administrators with access to digital content and curriculum is important. In fact, 85% of respondents said they're expanding or planning to implement more collaborative, shared learning experiences. Additionally, on-campus technology infrastructure is highly valued by education stakeholders, with 84% stating they want to create real-world experiences for students to foster learning. How? By redesigning learning experiences (82%) through the development of campus facilities and technology, and using emerging technologies such as virtual classrooms, room-centric technology, smart buildings and augmented/virtual reality technology.



# Harness Digital To Modernize Education

OVERVIEW

SITUATION

APPROACH

OPPORTUNITY

CONCLUSIONS

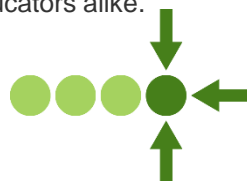
1 2 3

## Enabling Technology In Education Is A Multi-Headed Beast

Today's education infrastructure is multi-layered, it encompasses everything from campus facilities and data centres to software/applications and platforms. Unsurprisingly, primary/K12 institutions often focus on technologies to enable in-room initiatives. In comparison, our study found that higher education technology investments focus on supporting mobile and virtual classroom environments.

Ultimately, education institutions look to maintain their current environments as they must sustain the level of service being provided to students. This is why 80% of survey respondents identified online learning technologies and productivity tools to enable their strategic priorities. However, they're also becoming more forward-looking by tracking emerging technologies to consider in the future like virtual labs and augmented reality solutions. Essentially, these new solutions can help deliver better and improved performance from students and educators alike.

*Over the next 12 months 74% of higher education institutions will be looking improve their mobility and supporting more flexible environments for both students and teachers compared to 67% of primary/K12.*



How important are each of the following technologies in helping you address the priorities for your academic institution?



Base: n420 key decision makers involved in influencing strategic education strategy initiatives  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2018

# Harness Digital To Modernize Education

OVERVIEW

SITUATION

APPROACH

OPPORTUNITY

CONCLUSIONS

1 2 3

## Get Passing Grades By Addressing Key Challenges

Academic institutions face a range of challenges as they pursue their technology initiatives which are broken down into three categories:

**Collaboration:** Technology not only helps to bind users together but, also helps to cultivate a collaborative environment that supports, learns and inspires all participants. Yet, 80% of respondents identified collaboration between all participants as the biggest challenge to achieving their priorities – mainly due to the lack of the right software platforms. Collaboration should be easy, interested and valued.

**Technology:** Being digitally connected, possessing the knowledge, skills and confidence to use technology effectively in a learning environment is time consuming, difficult and requires a steep learning curve. 70% of respondents said its challenging to deploy robotics in a class/lab environment. In fact, its difficult to implement smart rooms/technologies in general (66%), which is why pre-tested solutions enable evaluation before implementation.

**Experience:** Collaboration and technology present new opportunities to redefine the learning experience. However, the current scenarios faced by education institutions paints a different picture. Poor collaboration and inefficient use of technology means the experience deteriorates; 69% said they struggle to allow for more authentic learning experiences. As difficult as it is, education institutions continue to be challenged by providing consistent, relevant experiences that can be personalized (66%).

How important are each of the following technologies in helping you address the priorities of your academic institution? (Showing 'very challenging' and 'challenging')

■ Collaboration-driven ■ Technology-driven ■ Experience-driven

Facilitate collaboration between students, teachers and parents

80%

Allows for a more experiential learning environment through the use of emerging technology

76%

Deploy robotics in a classroom or lab environment

70%

Allow for more authentic learning experiences

69%

Enabling students to work at their own speed or pace

68%

Implement smart rooms/technologies

66%

Creating personalized experiences

66%

Base: n420 key decision makers involved in influencing strategic education strategy initiatives

Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2018

# Harness Digital To Modernize Education

OVERVIEW

SITUATION

APPROACH

OPPORTUNITY

CONCLUSIONS

1 2 3

## Revise The Number Of Third-Party Vendors To Decrease Complexity

Education institutions need help operationalizing their roadmaps and providing infrastructure for sweeping transformation activities. They're now turning to a fragmented array of third-party vendors including software vendors (61%), hardware and infrastructure providers (58%) and even system integrators (48%) to assist with their technology requirements. However, seeking out so many different types of third-party vendors only adds to deployment complexity because educators need to determine how to get each vendor's individual technology components to work together seamlessly.

To make sense of their third-party ecosystem, education stakeholders must re-define their technology partnership requirements. Rather than using many different types of third-party technology partners, education stakeholders should focus on selecting a few key technology partners that can help their education facility address multiple components and integration requirements.

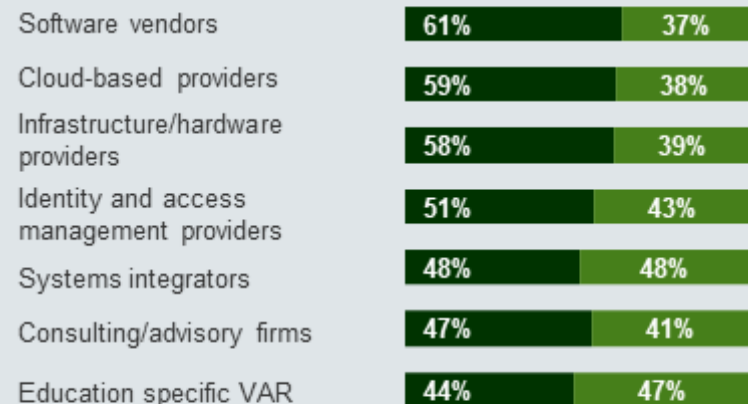
*Higher education institutions are more likely to seek out education specific VAR (50%) compared to primary/K12 (45%).*



Are you currently employing or planning to work with any of the following third-party organizations to meet your technology requirements? Who do you think will be able to help you?

■ Currently using

■ Planning to use within the next 24 months



Base: n420 key decision makers involved in influencing strategic education strategy initiatives  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2018

# Harness Digital To Modernize Education

OVERVIEW

SITUATION

APPROACH

OPPORTUNITY

CONCLUSIONS

1 2

## Modernizing Education Is Primarily Driven By On-Campus Experiences

Not all education-related applications, services and experiences can be distributed via online experiences or mobile devices. Research and development labs, virtual reality environments and collaboration environments can be implemented on campus to improve the learning experiences available to students.

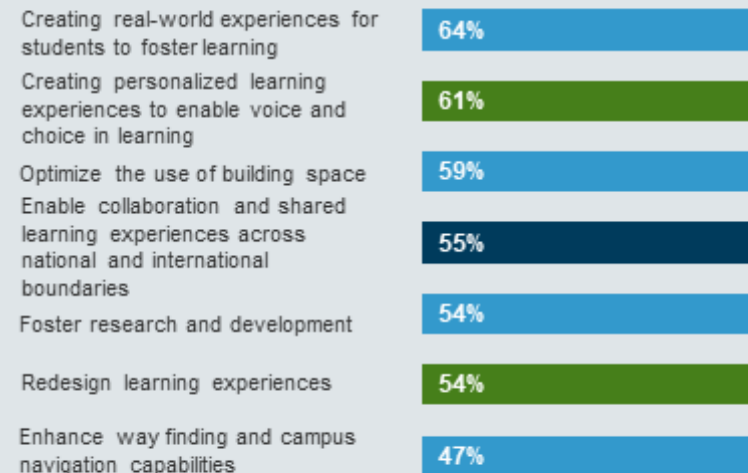
Educational institutions are significantly interested in prioritizing on-campus experiences. For example, 64% want to create real-world experiences for students to foster learning. They're also proactively rethinking the value proposition of their campus environment with 59% prioritizing the use of building space or enhancing way-finding and campus navigation capabilities (47%). However, creating personalized learning experiences to enable voice and choice can be applied to either campus or digitally driven priorities. Savvy education institutions look beyond these initial cost benefits to include differentiating the experience of students in the building, or enabling seamless navigation on campus..

*Self-service tools benefit staff and students to understand how to use new emerging technology, and get real-time reporting on their own performance (46%).*



Which of the following best describes the priorities of your education institution? (Showing 'critical' or 'high' priority combined)

■ Campus-driven ■ Digital-driven ■ Both



Base: n420 key decision makers involved in influencing strategic education strategy initiatives  
Source: A commissioned study conducted by Forrester Consulting on behalf of Dell, May 2018



# Harness Digital To Modernize Education

## OVERVIEW

## SITUATION

## APPROACH

## OPPORTUNITY

## CONCLUSIONS

1 2

## Learning Environments Should Be Anywhere, Anytime Experiences

Digital and virtual environments are an asset to educational institutions, and should extend beyond a consumption-only model. Capturing information in a digital format is valuable, but experiencing the benefits of personalized experiences enabled by this captured information is even better. To benefit from these personalized anytime, anywhere connected experiences requires software, applications and content to be available anywhere and anytime for students to learn and consume resources.

69% of educators agree or strongly agree that teachers need to flexibility to create and teach students in a manner which best addresses the student's needs and preferences – supporting the anytime, anywhere experience.

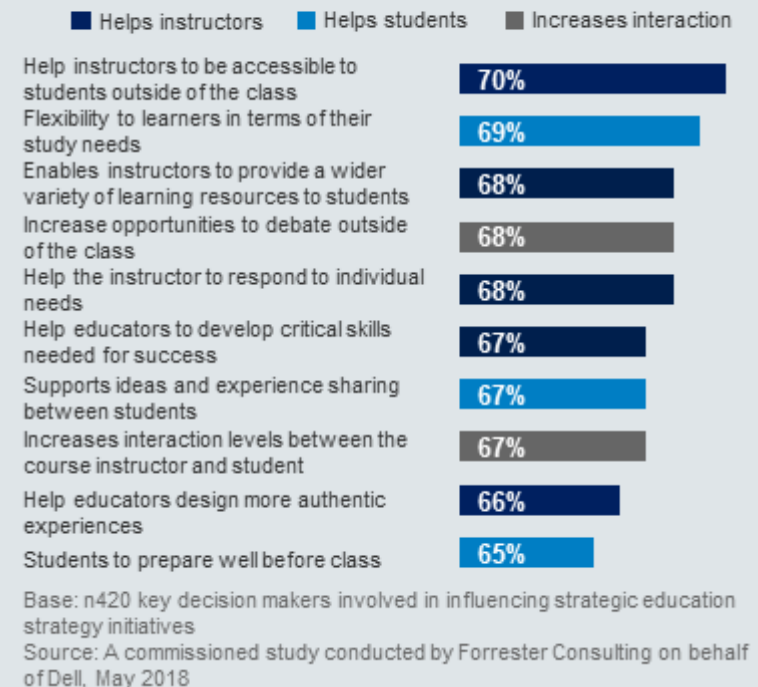
Creating centres for excellence in digital learning, academic institutions can allow instructors to be accessible to students outside of the classroom, enable flexibility for learners, and provide a wide variety of learning resources for students.

### Digital environments can...

- *Make classes more engaging (57%)*
- *Increase productivity of staff (55%),*
- *Personalize the education experience (47%)*



### How much do you agree with the following statements? 'A digital/virtual environment....' (showing 'strongly agree' and 'agree' combined)



# Harness Digital To Modernize Education

OVERVIEW

SITUATION

APPROACH

OPPORTUNITY

CONCLUSIONS

## Enable, Evaluate And Assess Digital Educational Requirements

Although the transition into a modern digitally-equipped education institution is a daunting one, with the right business strategy and partners a host of exciting new opportunities can be opened. Education institutions of all types are using digital technology to transform how students, teachers, and administrators teach, learn, and interact with each other and with their surrounding environment.



**Modernize the campus experience by enabling anytime, anywhere learning with partners.** Today's learning environments are primarily on-campus. However, education stakeholders must identify their future technology roadmap requirements by evaluating demand for various types of learning environments, stakeholder technology, campus evolution opportunities and the type of institution it is. But, avoid using a fragmented array of third-party technology partners which will only increase complexity.



**Enable collaboration as a core aspect of your technology transformation – and that includes partners.** Empowering students, staff, and administrators with the ability to seamlessly interact with each other and to access digital content and curriculum is a core priority for many education institutions. This journey should not be embarked on alone, instead focus on selecting a few key technology partners who can assist your education institution with multiple technology and integration components whilst collaborating with you.

### METHODOLOGY

In this study, Forrester conducted an online survey of 420 key decision makers involved in influencing strategic education strategy initiatives and digital transformation to evaluate the current state of the education sector. Respondents were from Canada, the US and the UK.

#### ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit [forrester.com/consulting](https://forrester.com/consulting).

© 2018, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to [forrester.com](https://forrester.com). [0000035163]

#### Project Director

Tarun Avasthy, Market Impact Consultant