Accelerating Digital Agility

Global CIO and IT decision maker technology insights for a cloud-first world

A Cisco Digital Report

CIOs and IT decision makers are focused on accelerating digital agility to thrive in a hybrid, multi-cloud, app-centric world. It's time to get Cloud Smart.

-Liz Centoni, Cisco Chief Strategy Officer and General Manager, Applications

Foreward

by Liz Centoni
SVP, Chief Strategy Officer and GM,
Applications, Cisco

In today's rapidly changing IT environment, CIOs and IT decision makers need to **accelerate digital agility** so businesses can rapidly pivot to meet the needs of customers in an increasingly digital world. They are focused on giving their teams speed, flexibility and choice to consume services from clouds, SaaS properties, on-premises and the edge. They need to enable users to **securely connect and consume apps and data** across all these environments and enable their teams to work wherever work takes them.

Applications are the way many users consume products and services today. Delivering the best application experience requires **visibility, insights and actions** across hybrid and multi-cloud environments. End-to-end security with control and governance balanced with simplicity is also essential.

For infrastructure and operations teams this creates a new paradigm and the need to drive a consistent cloud experience. CIOs and IT decision makers are focused on accelerating digital agility to thrive in a hybrid, multi-cloud, app-centric world. It's time to get Cloud Smart.

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Accelerating Digital Agility Report 2021

CIOs and IT decision makers from across the globe are challenged more than ever to accelerate their digital and cloud capabilities while protecting their organizations from an expanding threat environment.

Cisco's Accelerating Digital Agility research was deployed by Censuswide in November 2020, gathering insights from more than 23,000 CIOs and IT decision makers across 34 global markets.

The research found IT teams are focused on the future of work and productivity, maximizing their technology investments made at the height of the shift to remote work, delivering the best end-user experience, finding opportunities in the cloud, and driving innovation in a cloud-first world.

Achieve Business Resilience

Section 1

IT Leaders must keep their organization running and productive, at speed and scale.

IT's New Superpower: Digital Agility

Executive Perspective

by Todd Nightingale
SVP and General Manager,
Enterprise Networking and Cloud

This past year transformed our lives in so many ways – from buying groceries and educating our children to providing healthcare and working from home.

Technology groups had to find ways to keep critical services running, connect team members working from home, and leverage technology to keep everyone safe, healthy, and productive. At Cisco, we focused on making sure CIOs around the world had the technology and support they needed to transform their infrastructure, reimagine their applications, secure data, and empower their teams.

This rapid response has now given way to focus on how we deliver the technology required for an inclusive recovery. We need to be able to both react to sudden changes, and also use technology to drive transformation. Digital agility will be essential, not just for our return to work but also for the new normal of hybrid work, digital collaboration, and a cloud-first operating model.

To deliver this kind of agility, we need to focus on three key areas: accelerating our cloud transition with full-stack observability and cloud automation, connecting users with a network built for the cloud and hybrid work, and providing monitoring and assurance from user to application.

> Digital agility will be essential, not just for our return to work but also for the new normal of hybrid work, digital collaboration, and a cloud-first operating model.

Applications and access to data have become mission-critical and core to how organizations work today. Through the pandemic, we've seen teams accelerating their transition to the cloud because their businesses needed more agility. DevOps teams need to deploy apps in the most flexible way, meet geographical and regulatory constraints, optimize for performance and cost, and scale up and down quickly.

To remain agile, Cloud Operations teams are leveraging a hybrid cloud architecture with multiple public and private cloud nodes. That's why a real focus on cloud-neutral, multi-cloud orchestration is the key to successful delivery. Full-stack observability can help prevent surprises that might

slowing down or disrupting our users' application experiences. Powerful automation can keep our teams productive and strategically focused.

As we think about returning to the office, Cisco is building on a new hybrid work model. This means rethinking the way we connect users to applications. Working from home will no longer mean second-class IT service. Every user, everywhere, needs to enjoy one network, one policy, and one amazing experience. It is why we've focused so closely on delivering a secure, agile network architecture built for the cloud and hybrid work. Cisco's SASE architecture is the most complete and most flexible in the industry. By moving network security to the cloud and natively connecting our SD-WAN fabrics to that gateway, we can provide a truly agile, secure networking experience for every user, regardless of where they are.

We also need to provide even better visibility and insights, no matter where the users or the workload. Frequently these workloads will be in IaaS or SaaS clouds. Frequently the users will be working from home or on the road. Regardless, our technology teams require the ability to monitor and troubleshoot their users' experience. In order to deliver this, true internet intelligence is needed. Only a system monitoring private infrastructure and the public cloud can provide the visibility needed in this new cloud first, hybrid work world.

All of this needs to be done in a simpler, easier to consume way. We are driving our products onto a core set of platforms to enable you to leverage all the power of Cisco technology. And soon, you will be able to consume them as a service.

In a new Cisco survey, 70% of IT decision makers had already adopted cloud-based as-a-service solutions, citing greater flexibility, utility, productivity, and speed of innovations as top drivers. I believe that number is too low. All organizations need to drive towards cloud solutions that enable the insights and the automation necessary for the new normal.

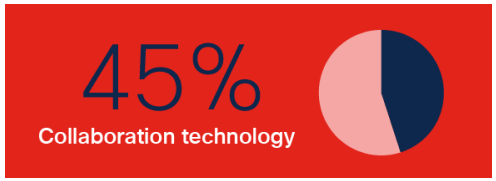
Delivering powerful technology in a simpler way will enable us to reach more people.

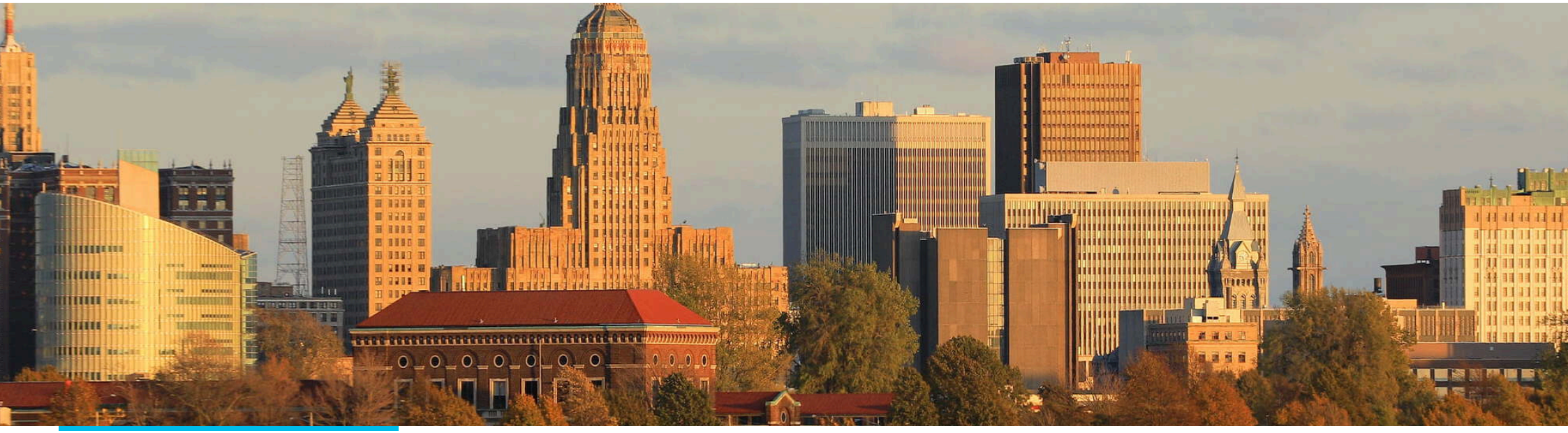
If we want to truly power an inclusive future for all – and an inclusive recovery - we need to put this agility into the hands of every IT shop and user – from investment bankers to family services agencies and healthcare providers around the world.

CIOs and IT decision makers (ITDMs) are making additional expenditures to optimize investments made for business resilience during the pandemic.

58% of CIOs and ITDMs predict that up to 50% of their IT budget will be spent on these additional investments

To maximize their investments made for business resilience, in 2021–2022 they'll invest in:



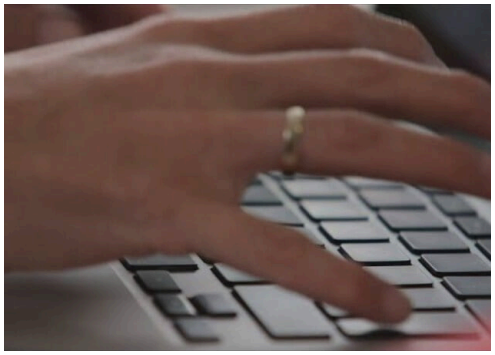


Story of Resilience

City of Buffalo, New York

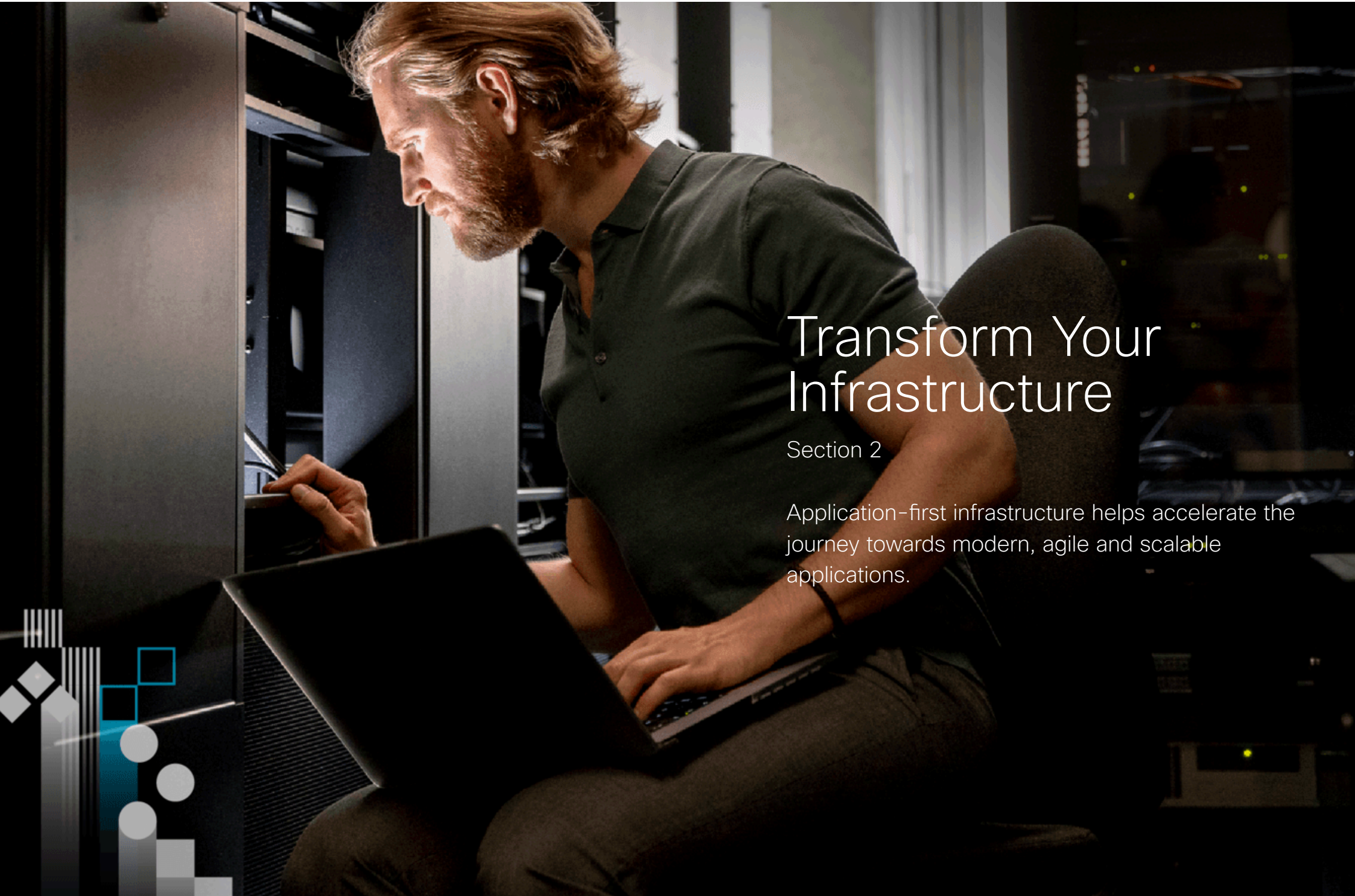
"The consistent access to the 311 Call & Resolution Center showed the City of Buffalo government at work providing for the needs of the community."

-Oswaldo Mestre, Chief Service Officer, Division of Citizen Services, City of Buffalo



We give citizens a sense of equity in their city. Open, always-on communication is a must.

- Oswaldo Mestre, Chief Service Officer, Division of Citizen Services, City of Buffalo



Transform Your Infrastructure

Section 2

Application-first infrastructure helps accelerate the journey towards modern, agile and scalable applications.

Modern, agile & scalable applications

Cloud – and, especially, cloud-based applications – opens a world of possibilities, especially when it comes to achieving business resilience.

But there is no single motion toward the cloud. Since most organizations are now operating in a hybrid, multi-cloud environment, CIOs and IT leaders must take advantage of expanded opportunities and the cloud-consumption experience regardless of whether their solutions are deployed on-premises or in the cloud.

For motions to cloud adoption in progress or planned for the future:

85% are leveraging at least one on-premises solution

83% are leveraging at least one multi-cloud and on-premises solution

83% are leveraging at least one private cloud solution

83% are leveraging at least one cloud-first/ cloud-native solution

86% think offering a consistent operational model that goes across on-premises, private cloud, public cloud, and SaaS is important or very important

Cloud offers the agility, speed and scalability that today's businesses demand.

Offering freedom of choice of environments (on-premises, private cloud, public cloud and SaaS)

84% important/ very important

Making infrastructure as dynamic as application software to meet the changing policy and optimization needs of the application and developer

86% important/ very important

Both 5G and Wi-Fi 6 bring a promise of dramatically better performance by transforming connectivity to meet the demand for low latency and higher speeds.

Next-gen networks [5G and Wi-Fi 6] will be key to technological evolution at my company, including accelerating cloud adoption

72% agree/ strongly agree

Next-gen networks [5G and Wi-Fi 6] will be available to me for adoption

72% agree/ strongly agree

Additional Resources

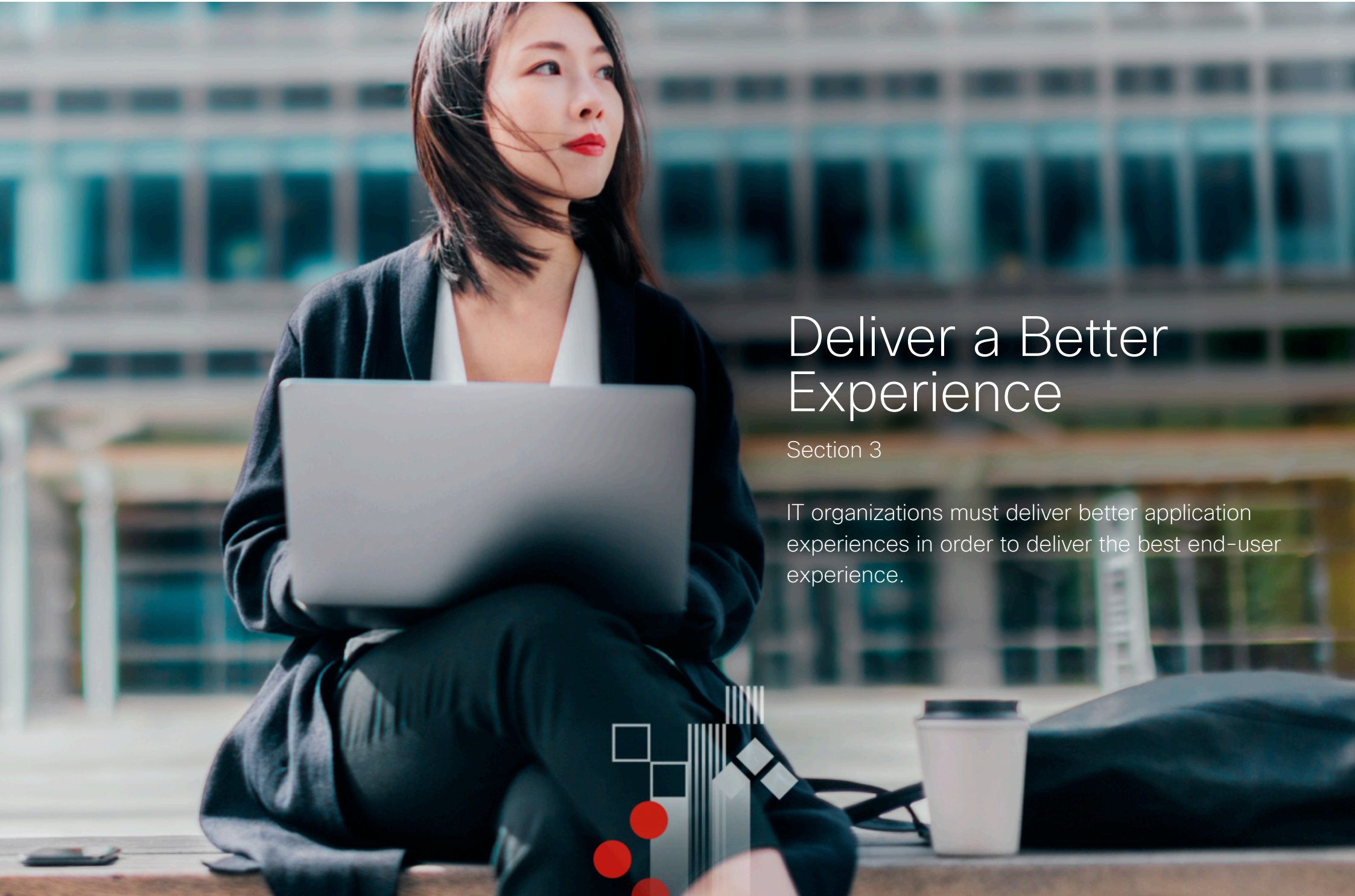
The Network
Thriving in a hybrid, multicloud, app-first world

Fierce Wireless
Cisco gets in on 5G action, including 5G private wireless

SDxCentral
Cisco Reveals Private 5G Enterprise Vision

COVID-19 accelerated digital transformation projects worldwide, on average three times faster compared with other years.

- Analyst Zeus Kerravala
Source: SiliconANGLE



Deliver a Better Experience

Section 3

IT organizations must deliver better application experiences in order to deliver the best end-user experience.

Applications – and the environments on which they rely – are becoming increasingly distributed, dynamic and complex, beyond the scale of human management.

Security, networking and infrastructure must evolve and take advantage of insights and automation to keep pace with the accelerating speed of (continuous) application delivery and iteration.

IT organizations must deliver better application experiences in order to deliver the best end-user experience. CIOs and IT decision makers say:

Ensure a **consistent application performance** across both the application and infrastructure to drive a great user experience

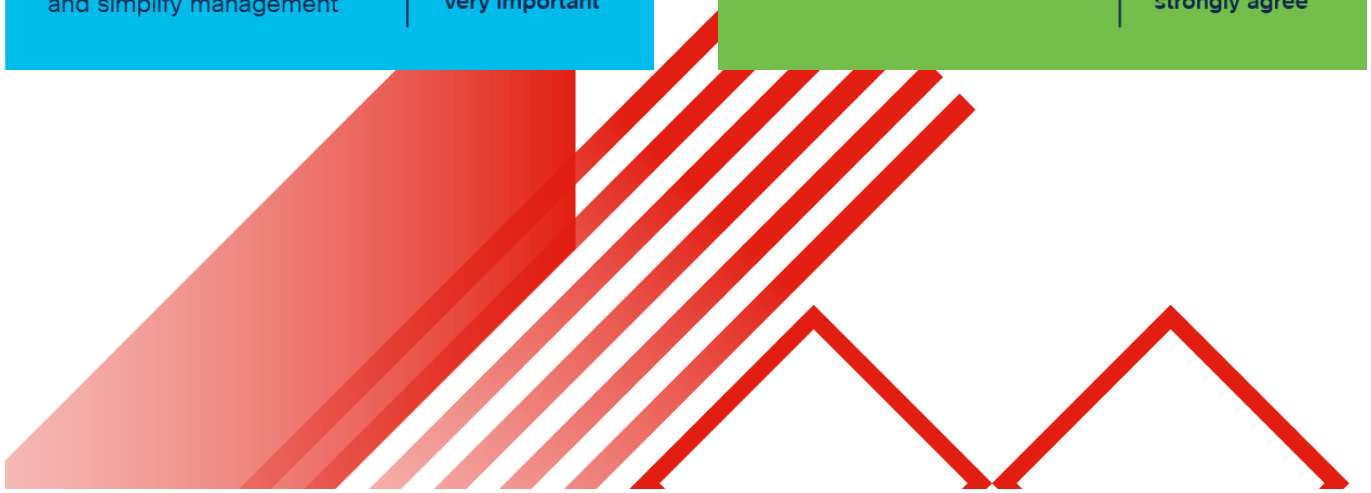
89% **important/ very important**

Create **optimized application experiences** that deploy faster, decrease network costs and latency, and simplify management

88% **important/ very important**

Customer experience is about delight vs. just satisfaction

72% **agree/ strongly agree**



CIOs and IT decision makers will use cloud to achieve business resilience via:

62%
Pushing apps to cloud

53%
SaaS Adoption

50%
Rewriting apps to be cloud native

Creating resilient and adaptive IT hinges on analytics, insights and automation. CIOs and IT decision makers:

76% want to be able to utilize business insights better

73% will use insights to drive automation to free up human time for more complex tasks

74% believe insights will be more important than ever to deliver a seamless user experience

Insights and automation that stretch from the application itself, across public, private or on-prem infrastructure is not just a nice-to-have, but necessary.

- Todd Nightingale, Cisco SVP and General Manager, Enterprise Networking and Cloud
Source: CIO.com

Secure Your Enterprise

Section 4

CIOs must ensure the right processes and solutions are in place to protect data on any device, anywhere.

As remote workers continue using potentially unsecured devices from unsecured home networks, IT leaders agree that securing the expanded thread landscape is paramount. Additionally, networking and security solutions are increasingly being combined and delivered from the cloud to support the dynamic secure access needs for organizations.

" As we move to the next normal, we see an acceleration in new ways of working that require organizations to evolve their cybersecurity approach so people can securely connect from anywhere, anytime, and on any device."
- Gee Rittenhouse, SVP and GM of Cisco's Security Business Group

" Understanding how data security mitigates financial risks will be crucial to establishing defensible data security budgets, while adapting to address new data-processing services, privacy laws, data security choices and security risks."
- Gartner, Hype Cycle for Data Security, 2020, Brian Lowans, 24 July 2020

“ Much of Cisco’s decision to enter the SASE fray is predicated on the rapidly evolving needs of its customers, which have seen their workloads and resources rapidly shift to the cloud, turning on its head traditional SD-WAN and security conventions.”
- SDxCentral

IT leaders agree that teams need highly secure access whether they’re at home or in an office:

Educating and building trust with employees and consumers when it comes to the security of their devices and privacy of their data

88%
important/ very important

Maintaining security, control, and governance across user devices, networks, clouds and applications

89%
important/ very important

Maintaining application-to-infrastructure security to meet compliance without slowing down the business

88%
important/ very important

69%

of CIOs and IT decision makers have adopted SASE solutions.

Why?

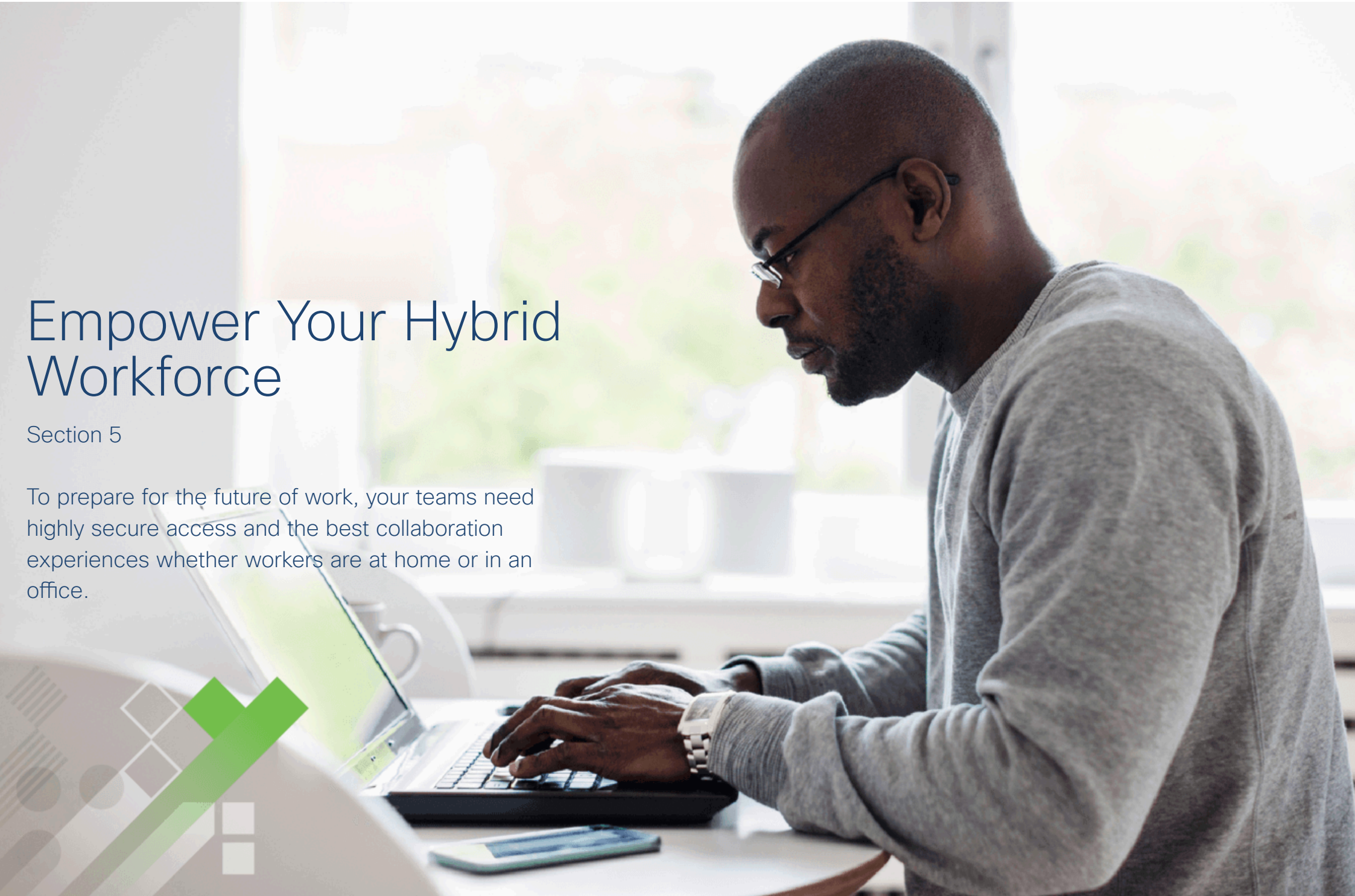
- 61% | Investing in cloud applications that need to be secured
- 56% | Like to stay up-to-date on industry best practices
- 37% | Workforce is going to stay distributed

Benefits

- 62% | Integration with cloud
- 59% | App performance
- 57% | Resource access from anywhere
- 57% | Reduced cost and complexity

The global pandemic has fast-tracked secure remote workforce connectivity to the top of the priority list for today's enterprise IT decision makers.

– Amit Verma, VP of Solution Engineering & Technology, Comcast Business
Source: SDXCentral



Empower Your Hybrid Workforce

Section 5

To prepare for the future of work, your teams need highly secure access and the best collaboration experiences whether workers are at home or in an office.

The Future of Work

In order to quickly shift to remote work, tech teams were forced to make years of technology investments and decisions nearly overnight.

But those investments need to be maximized in order to bring them to their full potential, and IT leaders are working to determine how technology will shape the future of work and productivity to empower their teams.

Twelve months after IT teams had to make a massive shift to remote work, IT leaders are still defining what the future of work looks like for their companies.

I am still unsure what the future of work looks like for my business in 2021

61% agree/ strongly agree

I will redefine what productivity looks like in 2021 compared to how we defined it pre-pandemic

73% agree/ strongly agree

To prepare for the future of work, leaders agree that their teams need highly secure access and the best collaboration experiences.

Empowering a distributed workforce with seamless access to applications and high-quality collaborative experiences

86% important/ very important

Securing remote work tools and protecting customer or employee data for distributed teams in the hybrid work environment

88% important/ very important

Additionally, investing in the right IT talent and training will be critical as organizations continue toward a cloud-first world.

Over the next 12 months, CIOs and IT decision makers are investing in:

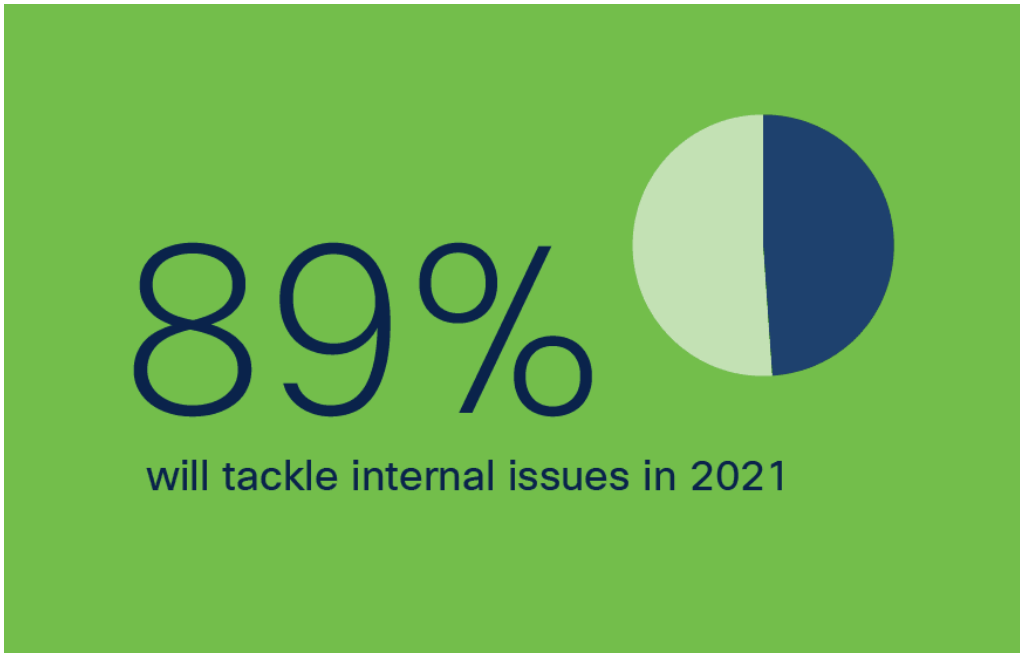
49%

Upskilling current talent

46%

Talent in new areas

Between 78% and 88% of CIOs and IT decision makers will use technology to facilitate tackling issues in areas like sustainability, employee mental health, privacy and diversity and inclusion.



In the future we'll put more focus on work and less on roles. But for all this to work we have to keep abreast of human development. Wellness and the mental health of our employees comes first.

-Fran Katsoudas, EVP and Chief People, Policy & Purpose Officer, Cisco
Source: CNBC

Accelerating Digital Agility

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