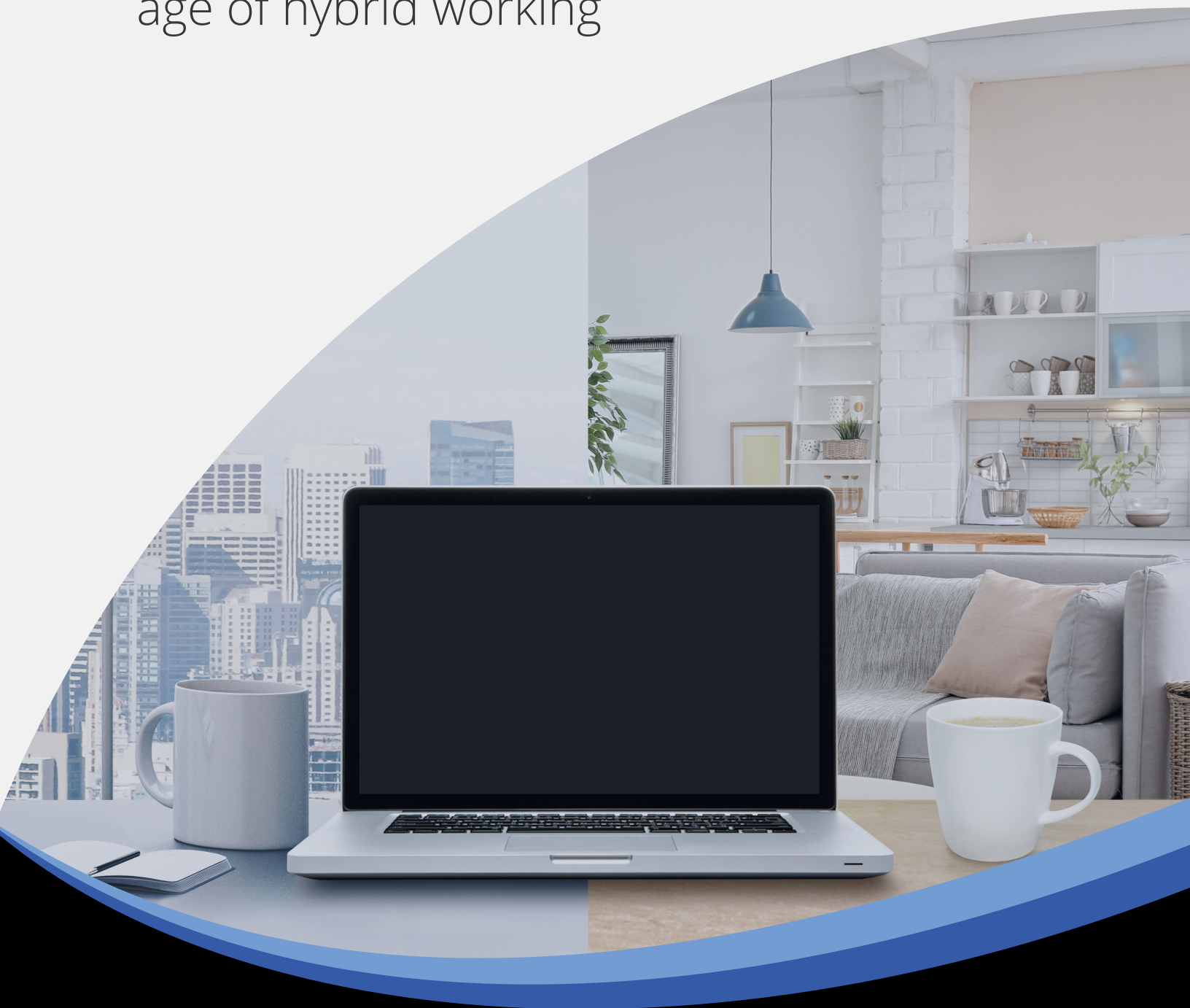




Integrating Control

Access and security in the
age of hybrid working



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Executive Summary

As companies advance into the next era of work, this report champions the need for system integration and adoption of hybrid working to run in tandem with cloud-based access control at the heart of your strategy.

As companies gear up for different ways of working, digital transformation is everywhere in business today. There is a growing realization that digital system integration must go hand-in-hand with implementation of hybrid working models to meet employee demand for flexibility.

There is often one overlooked aspect on the digital transformation journey – access control to physical buildings and spaces. This is despite the fact that cloud-based access control and security provide the key to a totally integrated system and are a significant determinant of workplace experience.

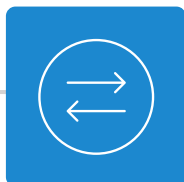
The report sets out the context in which cloud-based access control systems will increasingly operate – at the intersection between technology systems integration and the adoption of hybrid working by organizations, which is a key feature of the current landscape.

Our study moves past the theoretical and sets out the facts of what is actually happening on the ground with hybrid uptake, digital transformation, building security, connected technology ecosystems and decision-making with data before going on to identify and discuss four different organizational typologies in Brivo's custom 'Framework for Hybrid Integration'.

This model enables companies to plot where they are on their journey to digital transformation and hybrid working. It is based on the relationship between the level of system integration and the preparedness for adapting to the modern work environment. The four steps or stations along this journey are:



Bystanders



Wanderers



Returners



Integrators





Bystanders: Companies that are defined by a low level of hybrid adoption and a low level of system integration. They are 'caught in the headlights' – they have neither migrated towards hybrid working, nor have their senior executives bought into digital transformation. They are watching and waiting.



Wanderers: Companies that have enthusiastically embarked on a journey to hybrid working, but in doing so they have left themselves exposed – despite their high rate of hybrid adoption they are still in their infancy on their journey to digital transformation. This means that they are open to security threats.



Returners: Companies with low hybrid adoption but high systems integration. They are investing heavily in digital transformation but have turned their face against hybrid working as part of a deliberate strategy to build in-person office culture and collaboration.




Integrators: Companies that are leading the field when it comes to both hybrid adoption and system integration. They are determined to develop the digital infrastructure to support different ways of working and to remodel the office environment to meet changing employee needs and expectations.

Which type of organization are you?

The report makes the case that if companies are going to successfully implement modern hybrid working models, this strategy needs to be aligned with and supported by digital systems and infrastructure. And if the aim of hybrid working is to create a holistic and seamless experience where employees can be fully flexible, we propose that integrated digital systems should start with cloud-based security and access into the office building.

Once this area of digital transformation is nailed, it is a gateway to a full ecosystem of integrated smart technologies and data.



Which type of organization are you?



1

The Context for Change

What are the hurdles that companies face in the modern world of work? This section sets out what is happening with hybrid, digital transformation, building security, connected technology ecosystems and data.

We are now recognizing that the hybrid way of working is not a temporary one, with around 37% of employees working in a hybrid fashion and 18% not returning to the office at all, it's clear that workers have new expectations for the workplace. But this shift is creating new problems for organizations as they try to adapt to the hybrid model.

There are benefits in having less reliance on attending the office building to get work done. Employees who enjoyed more autonomy during the pandemic clearly favor being given more choice in how they work. But there are also some downsides. These include the increased risk around real estate which is more often left empty or poorly attended, and the threat to cyber security as there is a greater reliance on technology to store sensitive information online for employees to work on their projects both in person and remotely.

According to a March 2022 Microsoft study of hybrid working incorporated the opinions of 31,000 people in 31 countries, along with data from Microsoft 365 and LinkedIn, the experience of hybrid working is becoming more prevalent – up to 38% of the workforce are now working in a hybrid fashion, an increase of seven points since 2021.

Microsoft's research shows that more than half of workers (53%) are looking at transitioning to hybrid by the end of 2022. This clearly shows that employees are looking for opportunities to take their work hybrid if possible. However, the study also shows that 54% of managers think their leadership is out of touch with employee needs. Half of all leaders are planning on mandating their staff back to the office full-time, an attitude at odds with the large numbers of employees willing to look elsewhere for hybrid roles if their needs aren't fulfilled.

Clearly offering hybrid working is going to be an expectation employees have in the future, but company leaders need to get on board with delivering a high-quality hybrid experience in order to attract and retain their staff.

According to a March 2022 Microsoft study the experience of hybrid working is becoming more prevalent – up to 38% of the workforce are now working in a hybrid fashion, an increase of seven points since 2021.



The digital transformation journey

Many organizations are undergoing a period of digital transformation to accommodate modern hybrid ways of working. During the pandemic, companies invested swiftly and, in some cases, heavily in technologies to allow employees to continue to collaborate and connect. But now the implications of this investment are becoming apparent as many of these disparate technologies are not aligned and do not integrate into the wider digital ecosystem of the office building.

Research by Xerox sets out the top priorities for companies now that we have left lockdowns behind. In a survey of 600 respondents, the research found that 56% of companies are looking to expand their technology budgets in response to modern remote and hybrid requirements. This comes off the back of 42% of respondents indicating that technology was the most important factor that supported employee productivity and overall workplace experience during the pandemic.

Technology is an enabler of flexible working and a lens through which many employees now experience work, so it is critical to constantly test, learn and adapt new technologies to make sure the digital ecosystem works harmoniously and in line with people's expectations.

The digital transformation journey has been ongoing for many years. Before the pandemic, the focus was on the office building and digitally enabling physical spaces, making operations smarter and more efficient. The pandemic shifted this axis to focus on software technology – collaboration tools such as Teams, Slack and Mural to enable better communication while people worked remotely.

Now, digital transformation has become more complex as organizations need to stretch their strategies across all aspects of the workplace. This requires a greater level of integration between systems and patterns of work than ever before.

At its most basic level, digital strategies need to enable employees to freely move in and out of the office safely, securely and seamlessly. Hybrid work models have created an unpredictable flow into office buildings which means it is now harder than ever to manually manage the arrival experience of customers and visitors. Seamless access into the building for employees is the minimum requirement that people expect when they do decide to come into the office.

However, while access control should be the cornerstone of any digital transformation process, it is often one of the last components integrated into a digital strategy. Why is this the case? It could be that access to buildings is so heavily tied into the security of the building. And traditionally organizations have been wary of threats to cyber security but have been hesitant to properly invest in digital access control for fear of being exposed.



Security and hybrid working

How can organizations integrate the digital systems required for hybrid working with building access control to create a safe and secure entrance, and an enhanced and seamless experience for the user?

First, it's important to understand the security risks. Security, both online and in-person, has become a more complex issue in recent years. Without the reliance on closed internal networks and physical security teams being present in a building, there are more concerns around how companies can secure their businesses and reduce the risks that have come hand-in-hand with hybrid working.

As more companies transition towards a hybrid model, there are multiple factors to securing a successful transition and organizations will need an end-to-end strategy towards hybrid security that will ensure their safety regardless of who is present in an office space.

The remote dimension of hybrid working inevitably exposes organizations to a higher risk of cyber-attack. Research from cyber security experts, Help Net Security, found that 54% of employees cited up to six instances of network access issues when working from home, and company leaders claimed that home internet security and leakage of sensitive data was among their top security concerns.

And people have good reason to worry. Microsoft found that, 'hackers launch an average of 50 million password attacks every day, which equates to 579 per second. Phishing attacks have increased, firmware attacks are on the rise, and ransomware has become incredibly problematic'.

Security threats to companies in the aftermath of the pandemic are only increasing as time goes on. What solutions are out there to boost security for companies adopting a hybrid model?

Bridging the security gap in access control

Brivo's trend report 'Top Security Trends 2022: Hybrid Work Fuels Cloud-based Access Control Demand' surveyed more than 550 security professionals in order to ascertain their future priorities.

Within this survey, 65% of companies stated that access control and its integration with other technology has been wither very important or extremely important to enabling a hybrid workplace, highlighting the centrality of access control in the modern workplace.

The report also found that in the next 12 months 30% of organisations believe that they will need to lean on their technology solutions more in order to manage hybrid work.

Additionally, the report analysed the plans companies have to develop their businesses in 2022 and found that integration and optimisation are central concerns for companies, with 22% of organisations plan to integrate their security systems with other areas of the organisation and 21% want to understand how to better leverage their existing technologies.

It follows, therefore, that organizations require an end-to-end, centralized security solution that is adapted to hybrid working and can integrate in a smooth fashion with the running of other software. Indeed, there is growing awareness that investment is needed in this area of operations in order to create a smooth transition towards hybrid working as the new normal.



Making decisions with data

Another trend highlighted by Brivo's research is in data collection. The 2022 survey results clearly demonstrate an appreciation of the value that data collection can add to a security system – 38% of respondents stated that physical security data would help them improve physical security policies and procedures.

The collection of data not only helps organizations understand how the system functions better but can also enhance the overall security of a property. It does this by allowing an organization to recognize patterns of suspicious activity over time and therefore identify and resolve security threats that would potentially have otherwise gone unnoticed.

Furthermore, the collection of data on building occupancy, the utilization of space, and when employees enter specific areas can be integrated with other management data such as utility usage in order to reduce the overall energy usage, cut down on unnecessary operational costs and boost the sustainability of a building.

However, it is important to recognize that collecting data is not always simple. Brivo's report highlights that 70% of respondents have noted problems with their data collection whereby they either collect too little data to make any significant changes, too much data which overwhelms them or that they are simply collecting data on the wrong topics for their individual organization. This reduces the effectiveness of data as a tool that can support businesses.

Companies need security solutions that can integrate seamlessly with their other technology systems in order to make the data they collect in different arenas usable. They also need a solution that offers them the need-to-know information in order for data collection to be worthwhile.

Data can be transformational when used in the right way. However, companies need support in achieving a data-driven workplace with a security system which can underpin their needs and provide data designed in a way that promotes decision-making and change.

Integrating systems with hybrid work

The landscape of digital transformation alongside hybrid working is complex. It is important that companies embarking on this journey start with the basic requirements and do them successfully.

One of the minimum requirements is that when people choose to go into the building, they can do so efficiently and safely. With an inconsistent flow of people in and out of the office, organizations should establish access control firmly at the center of their plans for digital transformation. Access control for buildings needs to be seamless for the user, simple to manage for the facilities teams, and capable of providing those critical insights into who is in the building through data collection.

If the aim of hybrid working is to create a holistic and seamless experience where employees can be fully flexible, integrated digital systems should start with cloud-based security and access into the office building. Once this area of digital transformation is successfully integrated, it is a gateway to a full ecosystem of integrated smart technologies and data – and a better experience for employees.

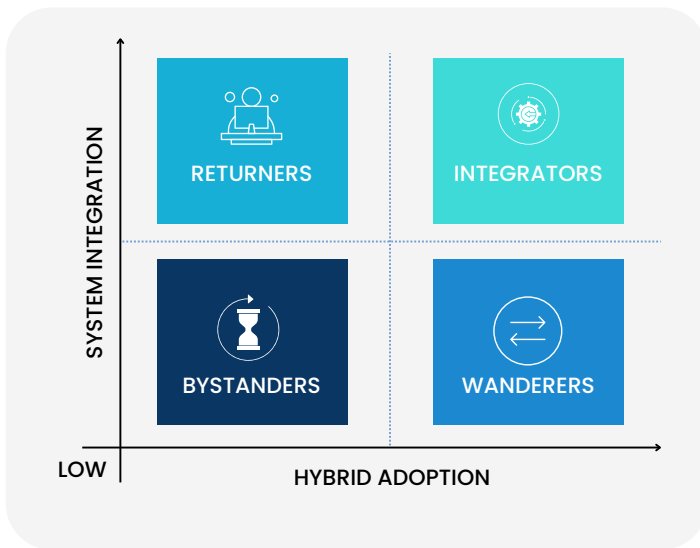


2

Companies are at different stages on the journey to transforming their workplaces, with companies setting different paces with their systems integration and hybrid working. This research framework presents four different organizational typologies.

As we discussed in the previous section, the journey towards hybrid working should be moving in step with the journey to digital transformation. Organizations have reached an inflection point where they need to consider how one impacts the other. But many organizations are currently just focusing on one aspect of workplace transformation while the other gets left behind.

In our research for this report, we have identified four typologies of organizations who are at different stages on the journey to integrating digital systems with hybrid strategies. Our model is based on the relationship between the level of system integration and the level of hybrid work adoption.



System Integration – this refers to the level of digital integration as part of an organization's digital transformation journey leading to a full ecosystem of smart technologies, including cloud-based access control, and data insights.

Hybrid Adoption – this refers to the level of preparedness for and implementation of hybrid working. Hybrid work enables employees to be more fluid and there is no longer a stable or predictable workplace population. High levels of hybrid adoption give employees more autonomy over how they work.

Companies can plot where they are on their journey to digital transformation and hybrid working, using this framework which allows them to analyse their journey in more detail.





Bystanders

Low Hybrid Adoption/ Low System Integration

Bystanders are companies that are defined by a low level of hybrid adoption and a low level of system integration. They are 'caught in the headlights' – they have neither migrated towards hybrid working, nor have senior executives bought into digital transformation.

Research by Brivo suggests that 39% of companies are not planning to make any changes to their work environment to accommodate hybrid working. This suggests that the Bystander typology is evident in a significant proportion of organizations.

Some Bystanders are typically mandating people back into the office in an attempt to re-create pre-pandemic working conditions, but without investing in new technology, system or office redesign. This group is watching from the side lines to see what others in their sector will do first. Instead of leading the way, they are paralyzed with indecision and are not necessarily collecting or analyzing the data needed to support their decision-making process.

Some of these companies clearly wish the pandemic had never interrupted the traditional 9-5 office flow and they are trying to find comfort in bringing this work style back, despite a stated preference by employees for hybrid working.

Cautiously watching and waiting can be a sensible option in some contexts. But there are dangers with operating on this basis. A lack of hybrid options might make employers elsewhere seem more appealing, adversely affecting talent attraction and retention. Another risk is that without any new investment in security, there is an increased likelihood of security breaches that could damage the company in question.

The reluctance to collect and analyze data means that Bystanders rarely have a true understanding of how their office is being used. Making informed and clear decisions based on data is the first step for these companies to start climbing the workplace experience ladder.

Bystanders will often be called out by their own employees, so they cannot sit idly by for a long time. Some firms in the legal sector, were example, were publicly criticised for their slowness to institute new policies for hybrid work, for changing their strategy multiple times, and for not supporting its workers through the transition. To leave its Bystander status behind, organizations must act on both hybrid adoption and system integration.





Wanderers

High Hybrid Adoption/ Low System Integration

Wanderers are companies that have enthusiastically embarked on a journey to hybrid working, but in doing so they have left themselves exposed – despite their high rate of hybrid adoption they are still in their infancy on their journey to digital transformation. This means that they are open to security threats.

This typology of a company does not have the digital infrastructure to meaningfully measure how their hybrid working strategy is progressing. In some cases, they are investing in remodelling their office space to enable the fluidity of their workforce, but they are not measuring the effectiveness of the space so they cannot adjust or adapt the space based on how it is really used by employees. They don't have the data to understand who is choosing to come into the office, and why.

Whilst the executives in these companies are on board with hybrid policies, they have not yet caught up with the centrality of digital strategy to hybrid working. Neither have they caught on to the centrality of cloud-based services to the future workplace.

Consequently, Wanderers have issues with digital compliance and are prone to breaches in security. Without the data to back up their move to hybrid, their decision-making is not as focused as it should be. They are also missing out on developing the skills and in-house knowledge they will need to run a cloud-based system in the future and are potentially being left behind when it comes to investing in employee knowledge.

Research from Brivo highlights that 49% of companies are worried about tailgating, credential sharing and inappropriate access with hybrid working. This suggests that companies are investing in hybrid without foregrounding security interventions and digital tools. While this group are early adopters of hybrid working, they have yet to align their policies with digital transformation and systems integration.

These are companies that are sometimes genuinely puzzled about hybrid and it is proving so hard to get right. The next step for this group is to marry their hybrid strategies with the right data and systems to create one seamless experience for employees and less headaches for the facilities team.



Returners

Low Hybrid Adoption/ High System Integration

Returners, found in the upper left quadrant, have low hybrid adoption but high systems integration. They are investing heavily in digital transformation but are not pursuing hybrid working. This is part of a deliberate strategy.

This group of companies aims to provide employees with a great digital experience and are generally willing to invest in digital transformation strategies. But the pay-off from this is that people must come to the office on a full-time basis with no or little opportunity for employees to embrace hybrid or work from home.

Research by Brivo shows that 38% of companies recognize the benefits of data analysis for physical security policies and protocols – Returners are likely to be among them. These firms can already see the interconnections between security, systems integration and digital enhancement when it comes to their workplace strategy.

However, they have deliberately turned their back on remote or hybrid work, citing concerns over the negative impact on company culture, collaboration, learning and mentoring. This stance potentially exposes them to a backlash from employees on the degree of flexibility being offered.

This group typically includes banks and law firms – high-profile ‘Resolute Returners’ that are especially worried about in-person mentoring. For example, Bank of America has mandated that staff be back in the office five days a week with no real hybrid option available on a permanent basis. For this employer, working from the office is envisioned as part of its culture and brand as well as part of its training ‘apprentice’ model where new employees learn by looking over the shoulders of other, more experienced staff.

CASE STUDY - Goldman Sachs

US banking giant Goldman Sachs has a classic Returner profile: it has been on its digital transformation journey since 2017, when the firm’s then CEO Lloyd Blankfein commented, ‘We are a technology firm. We are a platform.’ It has, however, set its face against hybrid working.

Blankfein’s successor, David Solomon, has commented that ‘there is a lot more opportunity for us to continue through digitization and the way we connect with our clients and the tools we use to create more leverage broadly’. Goldman Sachs is also rethinking innovation, CNBC reports, with the appointment of Jared Cohen, former CEO of Google’s tech incubator Jigsaw, to lead the investment firm’s new applied innovation initiative.

However, in tandem with all this, David Solomon has described hybrid or remote work as an ‘aberration’ and insisted that staff are back in the office five days a week. The mandate has had mixed results. Although the bank appears inflexible on its stance for hybrid working, it is focusing its efforts on digitizing work processes and introducing technology into a variety of different work streams, according to its CFO Stephen Scherr.





Integrators

High Hybrid Adoption/ High System Integration

The Integrators are leading the field when it comes to both hybrid adoption and system integration. They are determined to develop the digital infrastructure to support modern ways of working and to remodel the office environment to meet changing employee needs and expectations.

These companies have senior executive buy-in and are highly data driven in their approach to transforming the workplace. As a consequence, they have high rates of compliance and low security breaches, ensuring that they are protected as a company by integrating access and security into their policies from inception.

Brivo's research suggests that 65% of companies believe that access control integration with other technologies is very or extremely important in enabling hybrid working. Integrators are companies that have taken this approach seriously, investing in security as part of their digital transformation process.

As their hybrid and digital strategies are aligned with one another, Integrators are able to make effective decisions about the future of their organization and adapt to changing circumstances. But getting to this point isn't easy – companies that are leading the way have had to test, learn and adapt to achieve this level of alignment in such a short time.

CASE STUDY - Deloitte

Global professional services firm Deloitte has combined high-performance technology integration with a hybrid strategy. The firm has adopted a highly flexible model of hybrid work where no core demands are made of employees. This means that workers are able to select a workstyle that suits them and allows them to manage competing priorities, such as enhancing their career and taking on caring responsibilities, with ease.

In order to facilitate this move towards employee autonomy over where and how work is done, Deloitte took a new approach to its office design. This involved increasing the amount of collaborative space available for employees coming into the office for meetings as well as integrating 360 degree cameras in the workspace so that people working from home can seamlessly join discussions. This office redesign illustrates an understanding around the new needs of hybrid workers, and Deloitte has invested in technology that integrates into its environment and supports staff working remotely.

CASE STUDY - Cumulus Media

With the pandemic shaking up its normal ways of operating, US broadcasting company, Cumulus Media, decided to adopt a work from anywhere strategy for its 4,000 staff. Depending on their role, some staff are required to work from the office from time to time so Cumulus Media has retained office spaces for staff choosing to work hybrid. But with more than 300 locations, the company needed a security management system that would suit their new style of working.

With help from Brivo, Cumulus Media can now manage the security of all its buildings from any location in the US via a centralized system supported by cloud-based remote management. Security staff can now monitor buildings and manage doors from anywhere, regardless of different staff schedules. Investing in security has allowed Cumulus Media to facilitate remote working whilst not compromising on the security of its office locations.



CASE STUDY -KPMG

International consultancy firm KPMG has a four-day fortnight strategy for hybrid working which requires staff to spend four days in the office over a two week period. This allows KPMG staff a significant amount of autonomy when deciding where they work from whilst also retaining the need for functional office space.

KPMG is backing up its hybrid strategy with major investments in new technology and in office space redesign for hybrid delivery. Its intention is to evolve KPMG office spaces towards a set-up that is designed for collaboration, teamwork and learning.



3 The Way Forward

Smart access control is a gateway to enabling companies to address system integration and hybrid working within one wider ecosystem so that employee expectations and business goals are met.

The task of implementing digital transformation alongside adopting hybrid work adoption is complex. In the past, organizations could just about get away with addressing digital systems integration and modern ways of working as separate challenges. Now, it is clear that they need to work together in a wider ecosystem.

Smart access control can often be an overlooked component of digital transformation, but it provides the gateway into an office and sets the tone for the all-round digital experience an employee will have when they come into an office.

There are three key components organizations should consider when plotting their strategy for the future, and the right integrated access control can help.

1 Data

The ability to track what's happening in the physical office space is a critical part of systems integration. Occupancy tracking is one way to understand how office space is being used. Brivo recently introduced Occupancy Tracking for Brivo Access: this is a feature that allows security and facility managers to set occupancy limits by site based on corporate or local policy requirements and track the number of people inside an office. From this, organizations can make decisions around access. Brivo also projects data into a dashboard for trend analysis and data exploration so facilities teams can map patterns of occupancy and adjust facilities according to occupancy.

2 Security

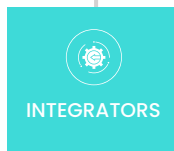
Whether people are working remotely or in the office, all systems need to be secure and safe. Hybrid working means that it is harder to manage who is coming in and out of the office and tailgating can become a significant security issue if the right systems aren't in place. The Brivo access platform allows cloud-based access control and video surveillance to be combined for ultimate facilities control. Facilities teams can get real-time views on the building that are securely stored in the cloud and available through remote access. Brivo unifies the security experience across both video and access control systems, allowing an organization to better protect employees, customers and visitors in the office.

3 Experience

Hybrid working enables choice for employees to work where they feel most productive. Part of this decision process will be around the type of experience they want, so the office has to deliver an attractive experience to be a viable choice for work.

This starts at the entrance to the building. Brivo has introduced mobile access using a smartphone. The Brivo mobile app provides tenants, employees and guests with an easy way to unlock connected doors and entrances in a building. Property managers can use Brivo mobile access control management to grant necessary access and control the property remotely. Employees can use their personal device biometrics like fingerprint and facial recognition to add an additional layer of security.

What's next?



The company typologies identified in our research differentiate where many companies are on their journey to hybrid-digital integration, and there are some key considerations for each archetype as they advance their future work strategies.

While Bystanders have a long way to go on their journey to integrating hybrid working with digital transformation, they have the biggest opportunity to align these two components from the outset – there is some benefit in being cautious. Returners have already established a strong return-to-office strategy, but they have no margin for error in the digital experience they provide. Employees coming in everyday will not stand for technology that creates boundaries so the digital experience and system integration will need to be flawless from when the employees access the building.

The benefits of hybrid working are deeply understood by the Wanderers, who prioritise autonomy of choice over anything. However, they need greater insights into how people are using their space to make it an attractive place for employees to choose to go to. For this, they need to invest in data collection and analytics that come from integrated systems.

Integrators already understand the important intersection of hybrid work and systems integration, and they've acted swiftly. But they can't afford to get complacent. Looking ahead, Integrators need to use the data they have from their integrated systems and constantly adapt their spaces to accommodate the changing needs of their flexible workspace. While this group may be trailblazing a path for success, they need to constantly maintain a balance between hybrid adoption and digital transformation to remain a go-to employer.



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About WORKTECH Academy

WORKTECH Academy is the world's leading membership club and intelligence network exploring the future of work. We look at innovation in the world of work and workplace through five key streams: people, place, technology, design and culture. We engage with our powerful network of over 9,000 individual members and more than 80 corporate, design and technology organisations around the world to deliver content on the latest trends, research and best practice in work and workplace. Brivo is a Corporate Member of WORKTECH Academy.

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WHY BRIVO

Brivo, Inc., created the cloud-based access control and smart spaces technology category over 20 years ago and remains the global leader serving commercial real estate, multifamily residential and large distributed enterprises. The company's comprehensive product ecosystem and open API provide businesses with powerful digital tools to increase security automation, elevate employee and tenant experience, and improve the safety of all people and assets in the built environment. Brivo's building access platform is now the digital foundation for the largest collection of customer facilities in the world, occupying over 300 million square feet across 42 countries.

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