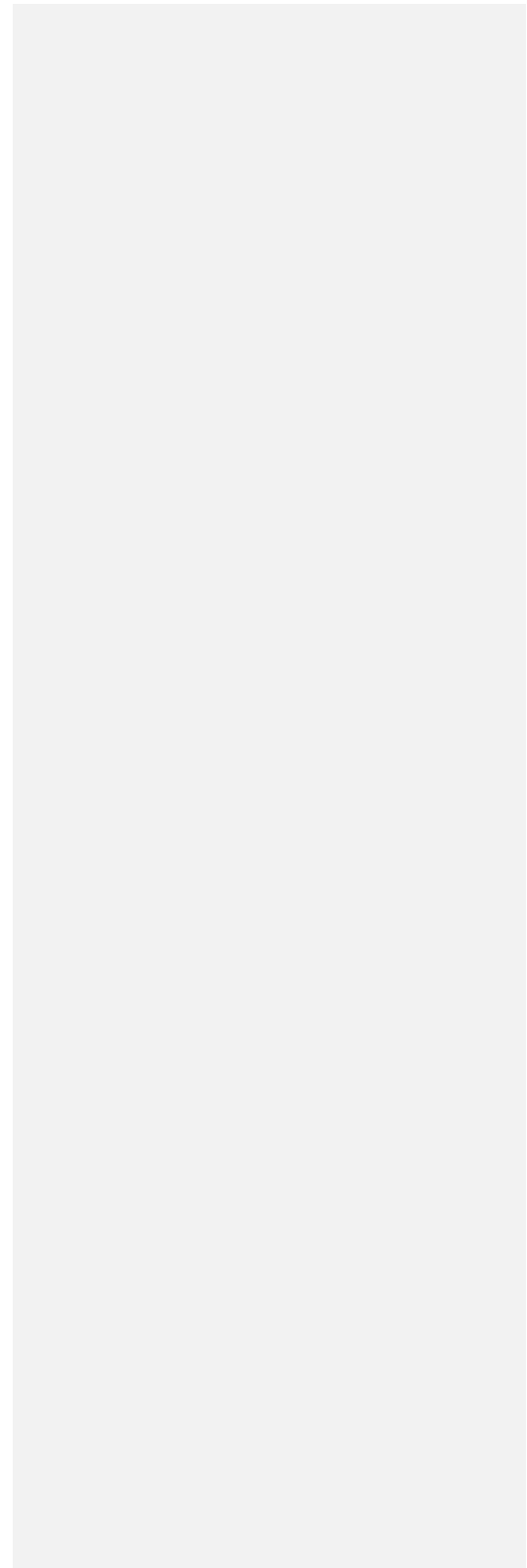


Tech Pulse – Final Report

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In March 2020 businesses around the world were thrust into a digital transformation. The way almost everyone does business changed and with all change comes challenge and opportunity.

Tech Manitoba, in collaboration with associations from a variety of industries and sectors, hosted a series of roundtable discussions and surveyed companies impacted by the fast transition to digital. Each of the information-gathering sessions discussed five key areas: Cloud Technologies, Digital Transformation, E-commerce, Cyber Security, and Business Systems/Line of Business Applications.

The purpose of this exercise was to listen and report on what challenges Manitoban businesses are facing as it relates to technology. In October of 2020 Tech Manitoba launched our Tech Pulse Initiative. We were fortunate enough to work with several industry partners over the past 6 months. During the course of this initiative, we hosted seven round table discussions and extracted invaluable insights from each group of participants.

This program allowed us to have thought provoking and informative conversations with business owners across the province. The Tech Pulse program allowed us to collect tangible data on what our community is facing. All the data we've collected will help guide and support Tech Manitoba as we continue to serve our members and our community.

This program was made possible by Western Economic Diversification Canada. In September of 2020 Tech Manitoba received a \$75,000 grant from WED that supported us in the creation of this initiative.

In total we engaged 15 different associations across the province. We listed those organizations below. Though not every one of these organizations was able to participate, they are interested in future engagement.

- Black Business Owners Association
- Morden Chamber of Commerce
- Manitoba Chamber of Commerce
- Portage La Prairie Chamber of Commerce
- Winnipeg Downtown Biz
- Bio Science Association of Manitoba
- Aboriginal Chamber of Commerce
- Construction Association of Rural Manitoba

The organizations that actively participated in the program are listed below:

1. Women's Enterprise Centre of Manitoba
2. Winnipeg Chamber of Commerce
3. Construction & Manufacturing Association of Manitoba
4. Brandon Chamber of Commerce
5. North Forge Technology Exchange
6. Exchange District Biz
7. Thompson Chamber of Commerce

We detailed key takeaways from each of our round table discussions below. The feedback varied from each group, but we gained valuable insights from each of these discussions. There were commonalities across all our conversations, things like access to proper resources and training.

Women's Enterprise Centre of Manitoba

Membership Size: 300+ Female owned businesses within their network

Number of Participants: 4

Key Takeaways:

- Implementing collaboration tools has been critical to business continuity throughout the pandemic. (Slack, Trello, SharePoint, Google Docs)
- Cloud based systems such as QuickBooks online have become significant business enablers for the participants of this round table.
- Cyber security is not top of mind for most of these business owners, and this is really coming from a lack of awareness or education.
- Leveraging cloud technologies has become a major business enabler for many of these organizations.
- Cloud suites such as Microsoft 365 and G-suite really help to streamline business processes well creating redundancies within your documentation.
- One of the important takeaways from this conversation was that business owners need more awareness around the tools that can save them time and aid in increased productivity.
- It is scary for business owners especially small business owners to approach new technologies. They aren't sure where to turn and they aren't sure who to trust. Creating more visibility as to who a trusted source is would be of a huge benefit.
- One of the narratives throughout this conversation was the concern of being sold things they don't need. These business owners simply don't know what they don't know. They often feel that software vendors are taking advantage of that in trying to sell them things they don't need.
- It would be wonderful if Tech Manitoba could provide an agnostic resource that organizations like this could lean on. This would advance their digital adoption and do so in a way that they felt more comfortable with.

Winnipeg Chamber of Commerce

Membership Size: 2,000

Number of Participants: 11

Key Takeaways:

- This round table identified that finding and utilizing the right technical tool is a challenging task for a small organization. Even something like finding a proper CRM for their business is a time

intensive process. Many of these business leaders have a tough time finding resources locally that can provide guidance along that journey.

- A few of the participants mentioned that g-suite and cloud-based platforms have become critical for them during this period of work from home.
- A few participants mentioned they were forced to adopt e-commerce quite quickly during the pandemic. Opening new sales channels was critical for their businesses to survive.
- Focus on continuity with processes centered around these platforms is a high priority. Many of these organizations have high turnover. It's important for these organizations that someone can pick up a system where the last person left it and get caught up in an efficient manner.
- Within this group of participants, we had a restaurant owner. He made some interesting comments around his rapid adoption of social platforms. During the pandemic he utilized digital marketing to stay relevant and competitive.
- Small business owners are thinking less and worrying less about managing cyber security.
- There has become a greater emphasis on staying connected with customers.
- Access to technology services for a reasonable price is a concern.
- Even the time required to research some of these tools is too much for a small business owner to take on. Some of these business owners can't afford to take an entire day to learn about each of these platforms.
- These business owners don't feel that they have an agnostic resource to turn to in order to better assess these digital platforms. This point was mentioned in many round table discussions. The importance of having an agnostic resource to turn to.
- Knowing where to turn for qualified and trusted recourses for things like SEO and e-commerce marketing is a challenge.

Canadian Manufacturers and Exporters, Manitoba

Membership Size: 2,500

Number of Participants: 10

Key Takeaways:

- CME has put together a lean manufacturing and advanced manufacturing assessment, but organizations are having a tough time working through that themselves.
- A few of the manufacturers recently adopted cloud Technologies to support things like email and data transfers and noticed that the rate in which they were being attacked jumped drastically.
- One large manufacturer with 7 factories across Canada but based in Winnipeg has recently transitioned from an on prem infostructure to a redundant cloud infostructure.
- Lots of these organizations are utilizing ERP (Enterprise Resource Planning) systems and that is a very time and cost intensive journey for them to undergo.
- There was some concern about the cost associated with the updating of legacy systems.
- More than any other sector or conversations we had, this group is utilizing modern technology such as IOT and robotics.
- Regarding the robotics, there was some concern around the legacy OS (Operating System) included within some of these systems.

- There is some concern around the IOT devices creating a security vulnerability (hacks executed through something like a smart thermostat).
- Many of these manufacturers are running legacy systems which makes them vulnerable to attacks.

Brandon Chamber of Commerce

Membership Size: 600

Number of Participants: 11

Key Takeaways:

- 3-5 year technology roadmaps have been expedited to 12–18-month roadmaps.
- Adoption of modern technologies has become necessary rather than optional in the world of Covid.
- Finding tech talent in Brandon is a challenge.
- Many of the members of this round table found it frustrating and challenging to work with US software vendors. They expressed that finding Canadian software vendors can be a challenge.
- Finding leaders within the community who have the proper skills and understanding to lead the organization through a digital transformation is crucial to supporting these businesses.
- Many business owners are finding it increasingly difficult to manage communications and outreach to customers. With an increased focus on social media marketing, many business owners are struggling to keep up.
- Most of these business owners do not have dedicated resources for technology. It is something that they either outsource or address when they have extra time.
- Cyber security is not something that these business owners are keeping top of mind. There is an attitude that as a small business they are not vulnerable.
- Throughout the pandemic, technology adoption has been forced on these business owners and a lot of these businesses are finding work overwhelming. As an example, if a business wants to start selling something online, they not only have to get a website up and running, but they also must make it secure. On top of that they must drive traffic to that website. So now not only do they have to be an ecommerce designer, but they also must be a digital marketing expert and somewhat of a cyber security expert.
- Many of these business owners don't know where to turn to for this guidance with technology.
- Many business owners across sectors and especially within this round table voiced the importance of increased training available to Manitoba businesses. Training in things like web design and digital marketing.
- The idea of creating a platform or resource site for Manitoba businesses to visit to find qualified services would be a huge help to many of these business owners.

North Forge Technology Exchange

Membership Size: 50+

Number of Participants: 2

Key Takeaways:

- One of the North Forge members is prepared to donate their time to help business owners better understand ecommerce technology.
- This round table was smaller than some of the others but certainly touched on some of the same trends such as access to talent.
- There was also a willingness from this group to support other small businesses in Manitoba through things like technology training or e-commerce advice.
- One of the key takeaways from this session is that there is a disconnect between these high-tech firms and some of the less technologically advanced organizations in Manitoba.
- There might be an opportunity to set up information sessions in collaboration with Tech Manitoba and North Forge.

Exchange District Biz

Membership Size: 100+

Number of Participants: 3

Key Takeaways:

- The Exchange is having a really difficult time getting consumer foot traffic downtown now that everyone has transitioned to work from home. They put proposals in to the city to help combat that problem utilizing technology but it was declined.
- A common trend throughout every conversation was the need for better training centered around things like digital marketing and e-commerce.
- One of the participants of this round table discussion owns a physiotherapy clinic and is having a tough time generating revenue as there is no way to offer services online like a doctor or psychiatrist would.
- Secure file access is an issue that none of these business owners really know how to approach.
- There was a restaurant business owner on this call. He said he felt lost during this rapid technology adoption. He was thrust into this digital transformation journey and was not sure where to turn for guidance or resources.
- All business owners on the call echoed how important technology is to enable proper communication with customers. Feeling unsure how to do that properly makes these business owners feel lost and helpless.
- The idea of creating an interactive map of the Exchange district was brought up. The idea is for individuals to pre-plan their trip to the Exchange district and see what businesses are located within the exchange.

- A comment we heard a lot throughout this exercise and certainly within this roundtable is that there needs to be a resource hub for business owners to learn about things like Digital Marketing and E-commerce. This is something that Tech Manitoba could certainly help to organize.

The Pas Chamber of Commerce

Membership Size: 50+

Number of Participants: 2

Key Takeaways:

- A few of these business owners are using marketing and accounting platforms to run their businesses but connectivity issues make that extremely difficult.
- Use of technology in other provinces is far ahead of how we are using technology in Manitoba and smaller MB communities are even further behind.
- The whole office for Flin Flon Community Futures was using one email address for everyone in the office up until a few years ago.
- If Manitoba is 5 years behind, Northern Manitoba is 10 years behind - businesses up North are having a harder time adapting to technology change.
- One business owner said that Marketing and Sales side has opened markets they would never have been able to open. Their online store is now driving sales all over the world, England, US, and Australia. Putting the store up really opened new markets for them.
- The government grants allowed them to create that online business which is the reason they were able to create that online store and it was a total game changer for their business. He was waking up to orders to Japan.
- Lack of connectivity is a problem, Internet speed in areas like Lynn Lake is atrocious.
- There is a lack of funding for small businesses to get online stores up and be competitive. Businesses are suffering when they do not have an online presence.
- They do not have technical resources up north, so they do not know who they can trust to deliver that work.
- There are no web designers or graphic designers so they must look elsewhere. There is a huge opportunity up North to do things like build websites. They want to keep money within their region.
- One business owner ended up hiring someone in Germany for his website.
- Small business owners do not have the capability to create an ecommerce store themselves. They need a way to be connected with the right resources for delivery.
- They are too busy working in their business and no time to work ON their business.
- They need help building relationships into Winnipeg. There are some cool products up north but how do we get them into Winnipeg? No one wants to start businesses because they are worried about reaching the markets they need.
- The people making the decisions in Winnipeg are not considering the north as much. They are so focused on getting more tech into Winnipeg when the north has huge connectivity issues.
- Students can't access school because they don't even have access to the internet.

- If people want jobs in tech, they leave and go to Winnipeg
- Local kids are excited about tech, but they don't want to leave their communities.
- Selling product online helps them grow their business and create economic stimulation.
- They are using Explornet, but it is very inconsistent with a lot of outages and interruptions.
- They now have Fiber in Flin Flon in some areas of the community.
- One participant reported download is under 10 and up for 2 - Wireless connection.
- The government could subsidize Starlink for business owners up North
- Access to high-speed internet in today's world is an economic enabler
- Lack of connection prohibits economic growth. They need representation from the North advocating for them.
- Maybe Tech Manitoba can host this conversation and bring communities together?
- University College of the North (UCN) is struggling with what programs to run in relation to Tech. Why train people if they are just going to leave their community in search of relevant work? They cannot do remote work without proper connectivity.

Summary |

This program provided us with an opportunity to reach into our community and gather information that otherwise would have been exceedingly difficult to gather. There were a few things that we heard repeatedly throughout this exercise. Things like being unsure of what technology to adopt, where to turn or who to ask. Business owners feel siloed - they cannot trust those selling them products but are not sure who to ask. We believe out of everything we discussed during these round table discussions, the two most impactful solutions would be access to agnostic advice and access to training.

Many business owners are prepared to put in the work to set up a digital marketing campaign or build an ecommerce website but they need help learning how. As for the agnostic advice, there is a real opportunity for Tech Manitoba to provide technology agnostic guidance to these community partners and their associated membership. There is a real opportunity for our organization to build out a program that can do that.

Key Takeaways

- Businesses need access to better training services (Digital Marketing, E-Commerce, SaaS Applications)
- Business owners need access to agnostic resources that can provide them with technical guidance.
- Poor connectivity in northern communities is a hinderance to economic development and collaboration. Business owners have had a difficult time selling products online or marketing their products/services to other communities.
- Manitoba businesses are ready and willing to adopt newer technologies but lack the guidance to do so. Many of these organizations do not have technical staff. With access to proper guidance and resources technology adoption would like increase within the province.

- Rural communities are further behind metropolitan centers in terms of their technology adoption. Poor connectivity and limited access to technical resources are both contributing factors behind this.
- From those business owners who have adopted newer technologies, it has proven to be a business driver for them. Through process automation, accessing new markets through online sales or hiring remote talent to name a few.