Benchmarking Your Enterprise Mobile Device Operations Initiatives And Plans

by Michele Pelino, October 10, 2012

KEY TAKEAWAYS

IT Executives Must Find Strategies To Support An Increase In Mobile Devices
IT executives are challenged with supporting more smartphones, tablets, and other connected mobile devices for employees, deploying more mobile applications, and establishing mobility policies to manage policies for bring-your-own-device programs to support employee mobility requirements.

IT Departments Must Identify And Prioritize Resources For Mobility Initiatives
Corporate IT infrastructure and operations (I&O) and security and risk (S&R) departments must focus on identifying, rationalizing, and prioritizing the specific and sometimes conflicting mobility requirements of three key constituencies: IT executives, business decision-makers, and employees.

IT Organizations Must Control The Multifaceted Mobile Device and Application Landscape
Business and technology solutions, including mobile device and security management services, bring-your-own-device (BYOD) programs, and mobile application stores, are used to address the increasingly complex corporate mobility environment.
Benchmarks Your Enterprise Mobile Device Operations Initiatives And Plans
Evaluate Your Firm’s Mobility Activities Against Industry Trends: Q4 2012
by Michele Pelino
with Stephanie Balaouras, Christopher Voce, and Thayer Frechette

WHY READ THIS REPORT

This report provides insight into corporate mobility adoption trends based on results from Forrester’s Forrsights surveys of IT mobility decision-makers and end user workers in North American and European enterprises. Infrastructure and operations (I&O) and security and risk (S&R) executives should evaluate their mobility strategy, operational, and security initiatives and adjust their activities accordingly. Key questions to consider include: How do your IT mobility activities and operations capabilities compare with other enterprises? Is your firm developing and documenting a bring-your-own-device (BYOD) program to support employee-owned mobile devices? I&O and S&R professionals must address these key issues as they develop and refine the strategic direction and road map of activities to support the use of mobile technology by their workforce.

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This research is based on ongoing client inquiries, briefings, and interviews with mobile service providers.

Related Research Documents
Address Complexity With Mobile Security And Operations
May 21, 2012
Corporate App Store Environments Open New Market Opportunities
February 22, 2012
Market Overview: On-Premises Mobile Device Management Solutions
February 22, 2012
MOBILITY MOMENTUM KEEPS I&O AND S&R PROS ON THEIR TOES

Corporate IT I&O and S&R departments are faced with the task of both identifying and prioritizing their financial, technical, and personnel resources to support mobility initiatives. Results from Forrsights Networks And Telecommunications Survey, Q1 2012 highlight that 64% of enterprises in North America and Europe are focused on bolstering mobility support for employees, partners, and customers.¹

The momentum of corporate mobility initiatives has accelerated among enterprises of all sizes. I&O and S&R executives are challenged with: 1) supporting a wide range of mobile devices and applications that run on a wide variety of mobile operating systems, and 2) managing updates to devices and applications every few months. The key issues include:

- **Supporting more mobile devices.** I&O and S&R executives must define strategies to support the significant increase in the number of mobile devices, such as smartphones and tablets, used in the workplace. Fifty-five percent of surveyed enterprises identify supporting a greater number of connected smartphones as a high or critical priority during the next 12 months (see Figure 1). In addition, 52% of enterprises prioritize supporting connected tablets such as Apple's iPad, the Motorola Xoom, the Nexus 7, and the Samsung Galaxy Note that are quickly making their way into enterprises as critical or high priorities. The sheer variety of mobile devices and their rapidly changing capabilities puts pressure on IT organizations to support these new form factors.

- **Addressing a fragmented mobile device form factor and operating system landscape.** The corporate mobile device landscape is further complicated by the fact that 66% of employees use two or more devices for work activities each day, including desktops, laptops, smartphones, and tablets (see Figure 2). I&O professionals must adapt to manage the fragmented mix of mobile devices and operating systems used, and often paid for, by employees. These employees expect the IT department to support their mobility service needs, even if their personally selected mobile devices are not on the corporate-approved device list. The trend for employees to select, purchase, and use their personal mobile devices and mobile services for work is known as consumerization of IT.

- **Expanding support to address the mobility needs of various end user constituencies.** Many companies are expanding their mobile support for employees, partners, and customers. In fact, 52% of firms are focused on providing more support for employees who work out of the office. These workers are considered to be “mobile” by enterprises, and they use mobile applications to help them be productive and to stay in contact with other employees while they are out of the office. Examples of roles in this category include sales executives and field service professionals. It’s even more interesting to note that 45% of enterprises are prioritizing more mobile support for employees who work inside the office, and 44% are focused on providing more mobility support for their customers.
**Figure 1 Enterprises Focus On Supporting More Mobile Devices, Management, And Security**

*“What are your firm’s top mobile priorities during the next 12 months?”*

<table>
<thead>
<tr>
<th>Priority</th>
<th>High priority</th>
<th>Critical priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement/improve mobile security</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement a comprehensive corporate mobile strategy</td>
<td>42%</td>
<td>14%</td>
</tr>
<tr>
<td>Support more Internet-connected smartphones</td>
<td>44%</td>
<td>11%</td>
</tr>
<tr>
<td>Support connected touchscreen tablets or slates</td>
<td>42%</td>
<td>10%</td>
</tr>
<tr>
<td>Provide more mobile support for out-of-office users</td>
<td>42%</td>
<td>10%</td>
</tr>
<tr>
<td>Implement a mobile device management solution</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide more mobile support for employees in the office</td>
<td>37%</td>
<td>8%</td>
</tr>
<tr>
<td>Provide more mobile support for customers</td>
<td>33%</td>
<td>11%</td>
</tr>
<tr>
<td>Provide more support for employee-owned devices</td>
<td>32%</td>
<td>6%</td>
</tr>
<tr>
<td>Provide more mobile support for partners and suppliers</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>Use some/more third-party services for mobility management</td>
<td>21%</td>
<td>3%</td>
</tr>
<tr>
<td>Hire IT staff with mobile app and support skills</td>
<td>18%</td>
<td>3%</td>
</tr>
<tr>
<td>Implement a corporate mobile app store</td>
<td>15%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base: 576 North American and European mobile decision-makers at enterprises (1,000+)

Source: Forrsights Networks And Telecommunications Survey, Q1 2012

Source: Forrester Research, Inc.
Figure 2 Sixty-Six Percent Of Employees Use At Least Two Devices For Work On A Daily Basis

“During a typical day, how much time do you spend using the following devices for work?”
(Use ever)

- Overall desktop*: 82%
- Overall laptop*: 53%
- Desktop, laptop, and smartphone: 28%
- Desktop and smartphone: 2%
- Only desktop: 50%
- Only laptop: 6%
- Overall smartphone*: 35%

*Base: 4,982 North American and European information workers
Base: 3,603 North American and European information workers
(percentages do not total 100 because of rounding)

Source: Forrester Research, Inc.

MEET YOUR STAKEHOLDERS AND THEIR CONFLICTING MOBILITY REQUIREMENTS

Three key constituencies — IT executives, business decision-makers, and employees — each with specific, and sometimes conflicting, requirements are the customers I&O and S&R pros must serve. Adding to this complexity are the accelerated timelines (typically in months, not years) for releasing new mobile devices and applications. Underlying the mobility initiatives of these constituencies is the requirement to ensure the security of the devices, applications, and data used to enable these mobility solutions. The key stakeholders are:

- **IT executives who want to control the fragmented corporate mobile environment.** The key goal guiding IT organization activities is to control the fragmented mobile device and application landscape. IT’s preference is to support a shortlist of corporate-approved mobile devices and applications. These mobility solutions also need to be scalable and standardized as well as delivered in a secure, cost-effective manner.
- **Business decision-makers who drive mobility requirements to support employee productivity.** The driving force behind business decision-makers’ mobility requirements is to improve employee productivity. Business executives are looking for ways to provide employees with mobile devices and applications to help them complete work activities and business processes more quickly and efficiently. These mobile applications are often targeted to address the specific needs of functional users such as sales or marketing.

- **Employees who want the flexibility to personally select and use mobile devices for work.** Forrsights Workforce Employee Survey, Q2 2012 results show that 67% of employees in North American and European firms choose the smartphone they use for work and that 70% choose the tablet they use for work (see Figure 3). These personally selected mobile devices are not included on the company-approved list of devices, and these mobile devices are not officially issued by the company.

**Figure 3 Many Employees Choose The Mobile Devices They Use For Work Activities**

> **“How were the following work devices chosen?”**

<table>
<thead>
<tr>
<th>Device</th>
<th>Desktop (N = 4,129)</th>
<th>Laptop (N = 2,606)</th>
<th>Smartphone (N = 1,749)</th>
<th>Tablet (N = 620)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I chose it myself</td>
<td>20%</td>
<td>13%</td>
<td>15%</td>
<td>70%</td>
</tr>
<tr>
<td>The company issued it directly</td>
<td>71%</td>
<td>14%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>I chose it from a company-approved list</td>
<td>8%</td>
<td>15%</td>
<td>37%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: North American and European information workers

Source: Forrsights Workforce Employee Survey, Q2 2012
MAKE BUSINESS AND TECHNOLOGY ADJUSTMENTS TO STAY AHEAD OF DEMAND

The increasing diversity of end user mobile devices and mobile application initiatives is driving IT executives to pursue a variety of different corporate initiatives. The rapid cadence of new devices, the accompanying need to support them, and the expanding number of mobile applications deployed over them are posing challenges to IT professionals. To address this fragmented mobile device and application landscape, IT executives are pursuing various business and mobile technology solutions (see Figure 4). How are your peers adapting?

■ IT executives expand their budgets to support mobility initiatives. To support corporate mobility momentum, many IT executives are backing up these mobility initiatives with increased spending. In fact, 60% of surveyed IT executives are increasing their central IT budgets to support employees with more mobility support, device access, and mobile applications. It’s important to note that IT executives are also looking for budgets to support corporate mobility initiatives from outside their own organization. In fact, 32% of firms are getting additional funding from business units to pay for mobility support, access, and applications to address corporate mobility requirements.

■ I&O and S&R pros employ mobile device management solutions to help bring order. The diverse array of mobile devices and new applications making their way into enterprises is staggering — and potentially paralyzing. In fact, 57% of firms identify implementing a mobile device management solution as a critical or high priority in the next 12 months. These mobility management solutions help IT organizations provision, repair, replace, lock, and wipe mobile devices. Early adopters of mobile management solutions are implementing device configuration and mobile device security solutions. Many firms deploy basic security measures such as password policy enforcement and device loss mitigation. Device encryption, antivirus, and URL filtering are advanced features that are gaining momentum.

■ Cross-functional stakeholder teams focus on developing a “bring-your-own” mobile strategy. As companies are forced to support new types of operating systems, devices, and applications for employees, many firms are focusing on developing and formalizing their bring-your-own-device mobility strategy. More specifically, 54% of North American and European firms are focused on developing a comprehensive corporate policy to support employees who bring their own smartphones and tablets to work and use them for work activities. BYOD strategy initiatives include identifying which mobile devices, applications, and services firms will support, as well as the policies and procedures to guide help desk and customer service support for employees, partners, and customers.

■ Proactive IT execs implement corporate mobile application stores. Many firms are expanding mobile applications to include line-of-business mobile apps that address the needs of workers including sales force, help desk, supply chain, logistics, and inventory management personnel. To distribute these mobile applications, 18% of enterprises are implementing
corporate application stores. Corporate application stores enable IT organizations to control
the applications employees can access as well as ensure consistent mobile application use
across the organization. Employees can find and download corporate-approved apps for
officially supported mobile operating system or mobile device. Firms that choose not to deploy
enterprise app store solutions can still address the application distribution needs of their
employees by leveraging successful consumer-focused app stores from vendors, including
Apple, RIM/BlackBerry, and Samsung. While these stores are primarily used for consumer apps,
organizations are using them to distribute corporate mobile applications as well.

- **S&R and I&O execs ensure mobility-related security issues are addressed.** Whether
mandated by company execs or simply a reaction to a high number of unmanaged devices
within their perimeter, IT professionals initially look for quick fixes in order to rein in these
devices. Nearly 50% of companies identify device security as their top priority in developing a
mobile device security strategy (see Figure 5). Device level security is generally addressed using
password and encryption policies and ensuring that lost or stolen smartphone devices can be
locked and wiped remotely. At an application level, data encryption can be achieved by using
data segmentation policies that separate corporate data from personal information. This data
separation enables enterprises to provide additional assurance over protection of corporate-
related information. Virtualized applications are another means to protect data by keeping
this information off the mobile device entirely. S&R executives must step up to address these
mobility security challenges in order to address corporate mobility requirements and business
decision-maker needs.
**Figure 4** Mobile Device Diversity Drives Firms To Implement Business And Technology Initiatives

“How will the increasing diversity of end user devices and apps (smartphones and tablets) affect your telecom and network spending between now and the end of 2012?”

- Increase our central IT budget to include support, access, and apps for these end user devices: 60%
- Implement a mobile device management solution to manage the devices: 57%
- Develop/implement a “bring-your-own” policy for smartphones/tablets: 54%
- Get additional funding from business units to pay for support, access, and apps: 32%
- Increase internal staff to support more end user devices: 21%
- Reduce telecom and network spending in other areas to pay for support, access, and apps: 20%
- Invest in a corporate app store to help us manage mobile applications: 18%
- Implement a chargeback system to allocate the additional costs back to the business: 15%
- Hire a third party to help us define how we will handle security for the devices and the associated apps: 12%
- Hire a third party to define a formal strategy for device, apps, and data access and provisioning: 10%
- Hire a third party to help us manage the devices: 10%

Base: 1,648 North American and European mobile decision-makers at enterprises (1,000+)

(Multiple responses accepted)

Source: Forrsights Networks And Telecommunications Survey, Q1 2012
Figure 5 Security Issues Are Leading Challenges When Managing Mobile Devices

“What challenges, if any, does your firm face when developing and managing smartphone/tablet applications and devices?”

- Providing device security: 49%
- Securing the apps: 48%
- The number of different platforms/operating systems: 42%
- Managing devices used for both personal and corporate apps: 40%
- Integrating the mobile apps with custom back-end systems: 31%
- Finding developers with skills to design the user interface: 28%
- Complying with regulatory requirements: 26%
- Rate of releases of the different operating systems/platforms: 22%
- Onerous and expensive licensing terms and conditions: 18%
- Form factor variations within the operating systems: 18%
- Ensuring use of the most up-to-date versions of apps: 16%
- Concerns around building native versus HTML5 apps: 15%

Base: 1,535 North American and European mobile decision-makers at enterprises (1,000+)
(multiple responses accepted)

Source: Forrsights Networks And Telecommunications Survey, Q1 2012

Source: Forrester Research, Inc.
RECOMMENDATIONS

PREPARE TO SUPPORT A COMPLEX MOBILE ENVIRONMENT

Employees are pressuring IT executives to open the door to personally selected mobile devices. To address this trend, IT and S&R executives must support increasing mobility complexity and identify strategies to simplify mobility management and security processes. Keeping ahead means that you must:

- **Identify and document a clearly defined, and potentially tiered, BYOD strategy.**
  Corporate BYOD policies must identify which mobile devices and operating systems (e.g., from Apple, Google, RIM, etc.) will be supported and what types of help desk support channels will be provided to employees who use their own devices for work activities. For example, employees who use corporate-approved devices or are on the road extensively may receive 24x7 customer service support. In comparison, employees not considered to be mobile workers may only receive online support and limited help desk support for mobile applications and devices. Security and risk executives must determine how to protect the firm from employees who use their mobile devices for personal activities, including downloading personal applications from public application stores, using external storage solutions such as Dropbox, or accessing personal applications such as Facebook. IT and S&R executives must also ensure that employees are educated on these corporate BYOD policies as well as informed of the implications of breaking documented BYOD policies and procedures.

- **Clearly define metrics to evaluate the impact of mobility solutions.** As IT and S&R executives expand the breadth and depth of mobile device and application deployment across the organization, they must determine how to measure the impact of these solutions. Many firms are concerned with the costs associated with supporting new types of mobile devices, operating systems, and applications. IT and S&R executives must consider how these mobility investments will affect the overall business processes, employee productivity, and strategic corporate initiatives, and define methods of measuring the ROI of these mobility investments. For example, promising that mobile applications will dramatically improve employee productivity or business process efficiencies is easy enough; however, proving the benefits of these solutions is a challenge. IT executives must work with line-of-business decision-makers and technology vendors to determine tactics to measure the impact of mobile solutions.

- **Consider using managed and SaaS delivery options for mobility services.** Many IT decision-makers are considering new types of delivery models for deploying mobility solutions. These as-a-service and managed service delivery models enable firms to reduce the cost and minimize the risk associated with deploying mobility technologies. A managed service model enables companies to grow mobile application costs in line with the growth of corporate demand for these solutions. These cloud-based and as-a-service delivery models...
provide IT and S&R executives with innovative engagement models along with innovative mobility solutions. For example, mobile device and application management vendors are expanding their delivery models to include both inside-the-firewall and cloud-based, as-a-service delivery models for these services.

- **Proactively reassess your corporate mobility strategy.** IT and S&R executives must revisit their mobility strategy on a periodic basis, ideally every six to 12 months. Issues to consider include: 1) reassessing mobility device and application road maps, spending priorities, and BYOD policies, and 2) future technology implications. During the reevaluation process, IT executives must make sure to consider the emerging mobility requirements from line-of-business executives and employees as well as include new corporate strategic initiatives. In addition, the implications of new technologies such as 4G/LTE network deployment, emerging multimedia mobile applications, and new mobile device form factors and operating systems (e.g., Windows 8) need to be considered.

**SUPPLEMENTAL MATERIAL**

**Methodology**

Forrsights Networks And Telecommunications Survey, Q1 2012 was fielded to 2,347 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester’s Forrsights for Business Technology and was fielded from January 2012 to March 2012. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives include gift certificates and research reports. We have provided exact sample sizes in this report on a question-by-question basis.

Forrsights Workforce Employee Survey, Q2 2012, was fielded to 4,982 information workers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with 20 or more employees. This survey is part of Forrester’s Forrsights for Business Technology and was fielded during March 2012 and April 2012. Toluna fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for rewards, as well as sweepstakes entries.
ENDNOTES

1 Forrsights Networks And Telecommunications Survey, Q1 2012 was fielded to 2,347 IT executives and technology decision-makers at enterprises in Canada, France, Germany, the UK, and the US. These IT decision-makers have significant involvement in the planning, funding, and purchasing of IT and mobility products and services. This online survey was fielded from January 2012 to March 2012.

2 Forrsights Workforce Employee Survey, Q2 2012 was fielded online to nearly 5,000 North American and European information workers. This survey focused on identifying worker adoption of, purchasing plans, and usage of various types of mobile devices, desktops, laptops, applications, and services.

3 Mobile device management (MDM) solutions allow I&O professionals to support multiple platforms and form factors, extend management and security policies to both corporate-liable and employee-owned devices, and automate service desk support. These capabilities are especially important to I&O executives who are developing bring-your-own-device (BYOD) programs to support the business needs and high expectations of empowered workers. For more details on the MDM market, and more than 40 vendors offering on-premises and cloud-hosted solutions, see the February 22, 2012, “Market Overview: On-Premises Mobile Device Management Solutions” report.

4 To manage and control the fragmented mobile application landscape, proactive companies are deploying corporate app store environments. Companies assemble these environments from three categories of app stores: consumer-focused app stores, vendor-sponsored app stores, and internal corporate app stores. Over the next four years, vendor strategists will expand corporate app store functionality beyond mobile application deployment to also offer comprehensive file sharing, storage, content sharing, and enhanced reporting and monitoring services for smartphones, tablets, and eventually PCs. See the following Forrester report for more details see the February 22, 2012 “Corporate App Store Environments Open New Market Opportunities” report.

5 Firms build corporate app store environments using three types of mobile app stores: 1) Consumer focused app stores (e.g. the Android Marketplace, the Apple App Store) enable mobile device vendors to distribute applications to individuals who purchase or use their devices; 2) Vendor sponsored app stores enable tech vendors and service providers (e.g., Cisco, SAP, Samsung, salesforce.com, AT&T, and Verizon) to distribute their mobile apps to customers; and 3) Internal corporate app stores are a channel or portal for firms to distribute corporate approved mobile applications to employees, partners, and suppliers. For additional descriptions of corporate app stores, see the February 22, 2012, “Corporate App Store Environments Open New Market Opportunities” report.

6 Developing a comprehensive mobility strategy requires I&O and S&R professionals to: 1) collaborate with corporate executives and business decision-makers across the organization; 2) communicate the need for a comprehensive mobile strategy to corporate stakeholders; 3) understand the breadth and depth of current and future mobility requirements; and 4) develop and document a road map to clearly define the timeline for deploying future corporate mobility initiatives. For more details on the key components to include in a corporate mobility strategic plan, see the May 21, 2012, “Address Complexity With Mobile Security And Operations” report.
Mobile metrics are typically implemented in fragmented silos; however, Forrester believes that mobile solution momentum requires infrastructure, operations, and security executives to take a strategic and systematic approach to identifying and capturing mobility metrics that address the impact on technical and strategic business requirements. A proactive approach to measuring mobile capabilities enables infrastructure, ops, and security execs to be strategic, efficient, and forward-looking. For a Balanced Scorecard methodology approach to identifying mobile metrics, see the May 11, 2012, “Develop Mobile Operations And Security Balanced Scorecards” report.

This benchmark information will help IT professionals in S&R and infrastructure and operations (I&O) make necessary adjustments to their strategy and projects. Key questions addressed include: “How do our mobile security and operations capabilities stack up against our peers? How do our support policies for personally owned devices stack up against the overall industry?” For a benchmark of budgets, spending intentions, technology adoption, and key trends in mobility, see the April 25, 2012, “Survey Employees To Target Mobility Improvements” report.
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