



# Mobile Workers Need Effective Collaboration Tools

The mobile information workforce is the bridge between businesses and their partners and customers. To fulfill this vital responsibility, mobile workers need to be able to continuously access information and expertise irrespective of their location. Therefore, mobile information workers' success depends on having constant access to mobility solutions that are highly available and geared toward communications and collaboration.

In October 2015, AT&T commissioned Forrester Consulting to evaluate how US mobile workers at companies of 20 to 499 employees utilize communication and collaboration technologies from their mobile devices, based on Forrester's own market data and a custom study of the same audience.

## SMB Workers Require Mobile Efficiency In The Age Of The Customer

The ability to communicate and collaborate while on the go is no longer a luxury for today's information workers; it is a necessity. In an age where customers expect to interact with companies anytime and anywhere, small and medium-size businesses (SMBs) must empower their workers with mobile tools and capabilities to serve customers on their terms. US information workers spend one-third of their day interacting directly with customers, clients, or patients (see Figure 1). This means visiting clients face to face, taking calls on the phone at a time that is convenient for customers, and being available when not in the office.

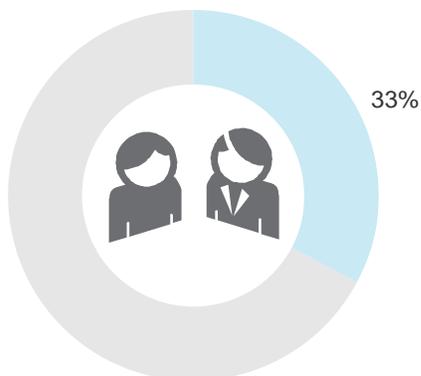
To be productive in the age of the customer, information workers need mobile devices for work. Forrester's Global Business Technographics® Applications And Collaboration Workforce Survey, 2015, found that 62% of US information workers at companies with between 20 and 499 employees agreed or strongly agreed that a smartphone is necessary

**FIGURE 1**

**Information Workers Spend One-Third Of Their Day Interacting Directly With Customers, Clients, Or Patients**

**“During a typical day, what percentage of your time is allocated to the following activities?”**

Working directly with customers, clients, or patients



Base: 608 US information workers (at companies with 20 to 499 employees)

Source: Business Technographics Global Applications And Collaboration Workforce Survey, 2014, Forrester Research, Inc.

for them to do their jobs (see Figure 2). Additionally 76% of respondents said that having a smartphone makes them more productive.

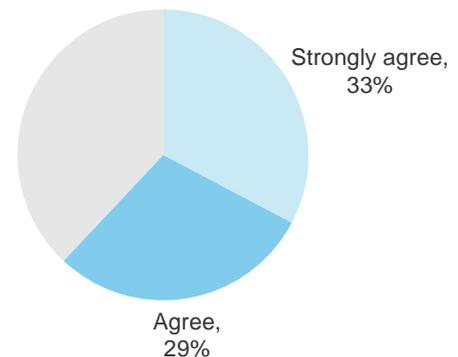
Because of this, more workers are using mobile devices for work than ever before. Smartphone usage continues to rise. In 2015, 68% of US information workers use a smartphone at least weekly for work, up from 55% in 2014 (see Figure 3).<sup>1</sup> Combined, 72% of workers are using some form of mobile device for work at least weekly. With rising usage and increased importance, small and medium-size businesses need to be sure they are giving workers the applications and solutions they need to succeed when working while mobile.

**FIGURE 2**

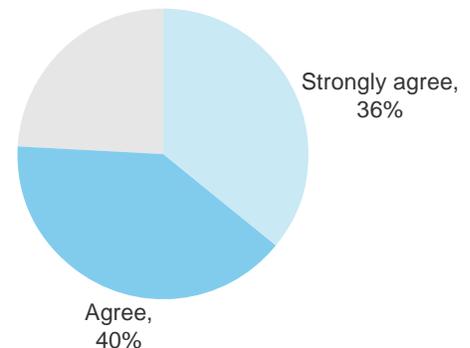
**A Majority Of Information Workers Think Mobile Is Needed To Do Their Job And Be Productive**

**“How much do you agree with the following statements about using a smartphone for work?”**

A smartphone is necessary to do my job.



Having a smartphone makes me more productive.



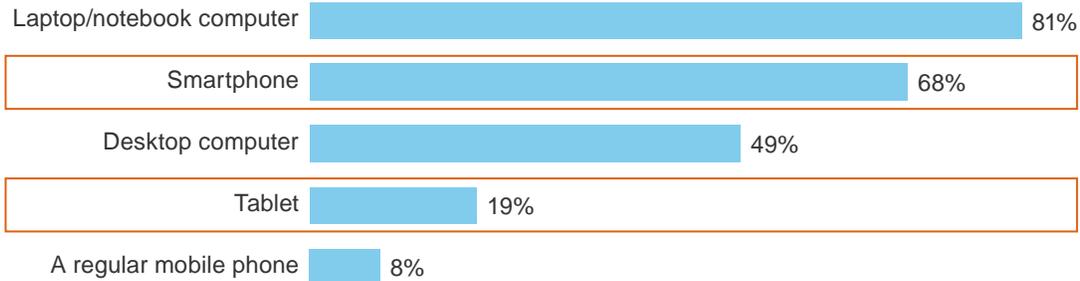
Base: 566 US information workers (at companies with 20 to 499 employees)

Source: Global Business Technographics Applications And Collaboration Workforce Survey, 2015, Forrester Research, Inc.

FIGURE 3

### Nearly Three Quarters Of US Information Workers Use A Mobile Device At Least Weekly For Work

“Which of the following devices (work-provided or personal) do you use at least weekly for work?”  
(Select all that apply)



There is significant overlap between smartphone and tablet users; 72% use at least one of the devices weekly for work.

Base: 777 US information workers (at companies with 20 to 499 employees)

Source: Global Business Technographics Telecommunications And Mobility Workforce Survey, 2015, Forrester Research, Inc.

## Workers Need Mobile Communications And Collaboration Tools But Find Them On Their Own

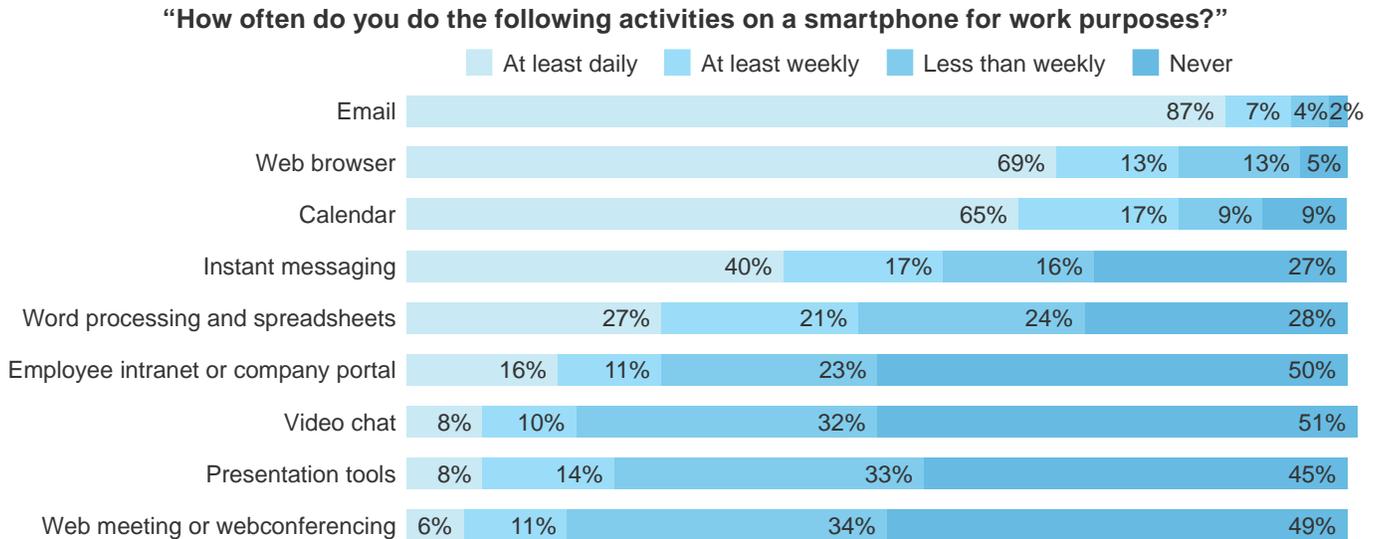
To remain productive while on the go, workers need access to tools that allow them to access information and provide expertise anytime, anywhere. This means they are constantly using their mobile devices to communicate with clients and coworkers, and to access information they need to delight customers and do their job effectively. Forrester's survey shows that workers use their smartphones for (see Figure 4):

- › **Email.** The preferred way to communicate and transfer information, email is not surprisingly the most used mobile application. Eighty-seven percent of US information workers use email at least daily for work on their smartphones, with many constantly checking their email app throughout the day. Being connected to email on mobile devices allows workers to remain in contact with customers and coworkers at all times, which is essential for better serving customers today.
- › **Calendar.** To keep apprised of their appointments and responsibilities, 65% of workers are using calendar applications on their mobile device at least daily for work. Mobile operating systems that include digital assistants make calendars more usable by suggesting when to leave for meetings and the best route to get there.

- › **Instant messaging.** Forty percent of workers use instant messaging at least daily on their smartphones, and another 17% use it weekly. Consumer mobile messaging solutions are acclimating workers to using these services over traditional SMS, paving the way for expanded use of this technology in the future.

FIGURE 4

## Mobile Collaboration Tools Like Email, Calendar, And Instant Messaging Are Used Daily By Workers



Base: 530 US information workers (20-499 employees)

(percentages may not total 100 because of rounding)

Source: Global Business Technographics Telecommunications And Mobility Workforce Survey, 2015, Forrester Research, Inc.

## WORKERS OFTEN SOURCE THEIR OWN COLLABORATION AND COMMUNICATION APPS WITH MIXED RESULTS

While US information workers are using mobile communication and collaboration tools to do their jobs, 65% are securing many of these apps on their own (see Figure 5). Factors contributing to this are:

- › **Innovative consumerized productivity apps.** Many small vendors have emerged to apply the unique capabilities of mobile devices — e.g., built-in cameras and geopositioning — to reinvent employee experiences with everything from email reading to note-taking. These apps fill gaps left by the traditional collaboration and productivity software vendors that work with IT departments, and they are easy for workers to start using since they are free.
- › **Employee empowerment.** IT leaders have long felt pressure to remove as many barriers to employee productivity as possible. This has led to many embracing bring-your-own-device (BYOD) programs and accepting — or turning a blind eye to — some of the apps employees use on these devices, allowing employees to work when, where, and how their tasks require. Making

this proposition tenable are enterprise mobile management solutions that allow IT departments to secure corporate data on these devices.

Even though they can choose their own applications, workers' satisfaction with mobile collaboration and communication apps is low. Our survey shows that only 30% of workers are fully satisfied (a 9 or 10 on a scale of 1 to 10) with their communication and collaboration apps, and 31% are less than satisfied (see Figure 6). SMB leaders are not unaware of this situation but may underestimate its severity: In a survey of US mobile technology decision-makers, only 24% thought their employees were fully satisfied with their capabilities.<sup>2</sup>

## Conclusion

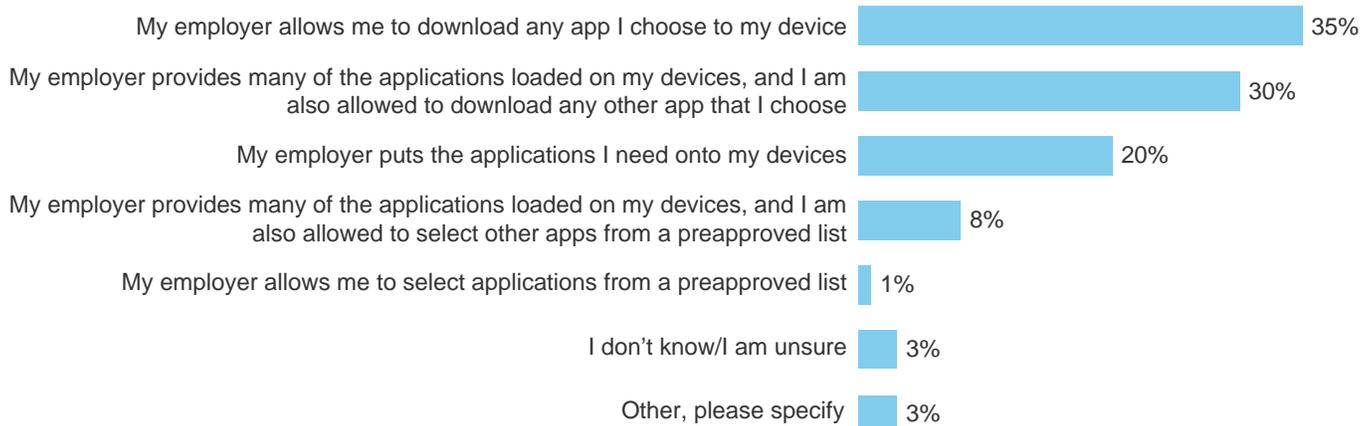
SMBs recognize that their employees need mobile collaboration tools to stay connected. However, provisioning and managing applications across the range of devices that employees want to use to stay productive while mobile is complicated. So it's understandable that businesses are tackling this issue with a mix of specific provisioning and employee self-service. But the information workforce tells us this strategy is not working.

Fixing this will not be simple: SMB IT leaders need to better understand how their mobile workforce communicates and collaborates, building their strategy to enable those working styles.

**FIGURE 5**

**Most Workers Can Choose Their Own Communication And Collaboration Applications**

**“Which of the following best describes how you currently acquire mobile communication and collaboration applications for devices today?”**



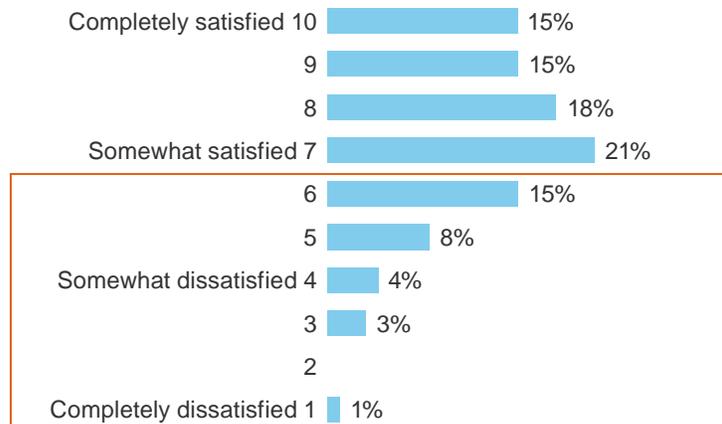
Base: 110 US mobile information workers (at companies with 20 to 499 employees)

Source: A commissioned study conducted by Forrester Consulting on behalf of AT&T, October 2015

**FIGURE 6**

**Only 30% Of Workers Are Very Satisfied With Their Communication And Collaboration Apps, 31% Are Less Than Satisfied**

**“On a scale of 1 to 10, with 1 being completely dissatisfied and 10 being completely satisfied, how satisfied are you with your ability to access and use enterprise communication and collaboration applications on all of your mobile devices?”**



Base: 110 US mobile information workers (at companies with 20 to 499 employees)

Source: A commissioned study conducted by Forrester Consulting on behalf of AT&T, October 2015

## Methodology

This Technology Adoption Profile was commissioned by AT&T. To create this profile, Forrester leveraged its Business Technographics Global Telecommunications And Mobility Workforce Survey, 2014, and its Global Business Technographics Telecommunications And Mobility Workforce Survey, 2015. Forrester Consulting supplemented this data with custom survey questions asked of US information workers at companies of 20 to 499 employees. Survey respondents all worked from multiple locations at least once a week and used a mobile device for work at least weekly. The auxiliary custom survey was conducted in October 2015. For more information on Forrester's data panel and Tech Industry Consulting services, visit [www.forrester.com](http://www.forrester.com).

## Endnotes

<sup>1</sup> Source: Business Technographics Global Applications And Collaboration Workforce Survey, 2014, Forrester Research, Inc.

<sup>2</sup> Source: "SMB Leaders Need A Mobile Productivity Strategy," Forrester Consulting report prepared for AT&T, July 2015.

### ABOUT FORRESTER CONSULTING

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