

The Expanding Role Of Mobility In The Workplace

February 2012

Corporate Mobility Initiatives Gain Momentum

Workers are increasingly mobile, and a majority of enterprises are focused on supporting the growing number of employees who use mobile devices such as smartphones and tablets to do their work at the office, at home, and while traveling. In fact, results from the Forrsights Networks And Telecommunications Survey, Q1 2011, show that 64% of firms in Europe and North America identify providing more mobility support for employees as a top priority.¹ Corporate mobility momentum will continue as an increasing number of employees purchase and use their personal smartphones for work-related activities, and a growing number of enterprises support bring-your-own-device (BYOD) programs to cost efficiently mobilize their workforce.

Mobile applications and services firms are broadening their solutions to address the needs of line-of-business workers in particular roles such as sales, marketing, customer service, and support. Our research revealed that leading activities workers access on both smartphones and tablets include accessing the employee intranet or portal and using email and/or calendar applications. However, there are also variances, depending on the type of device used. For example, smartphones are primarily used to read or view documents while tablets are more likely to be used to edit documents, access a web meeting, or perform processor-intensive activities such as analytics. The key benefits business units achieve from these mobility applications include increased employee responsiveness and decision-making speed, resolving internal issues faster, and increasing worker productivity.

Enterprises Prioritize Many Mobility Activities And Open Doors To Employee Devices

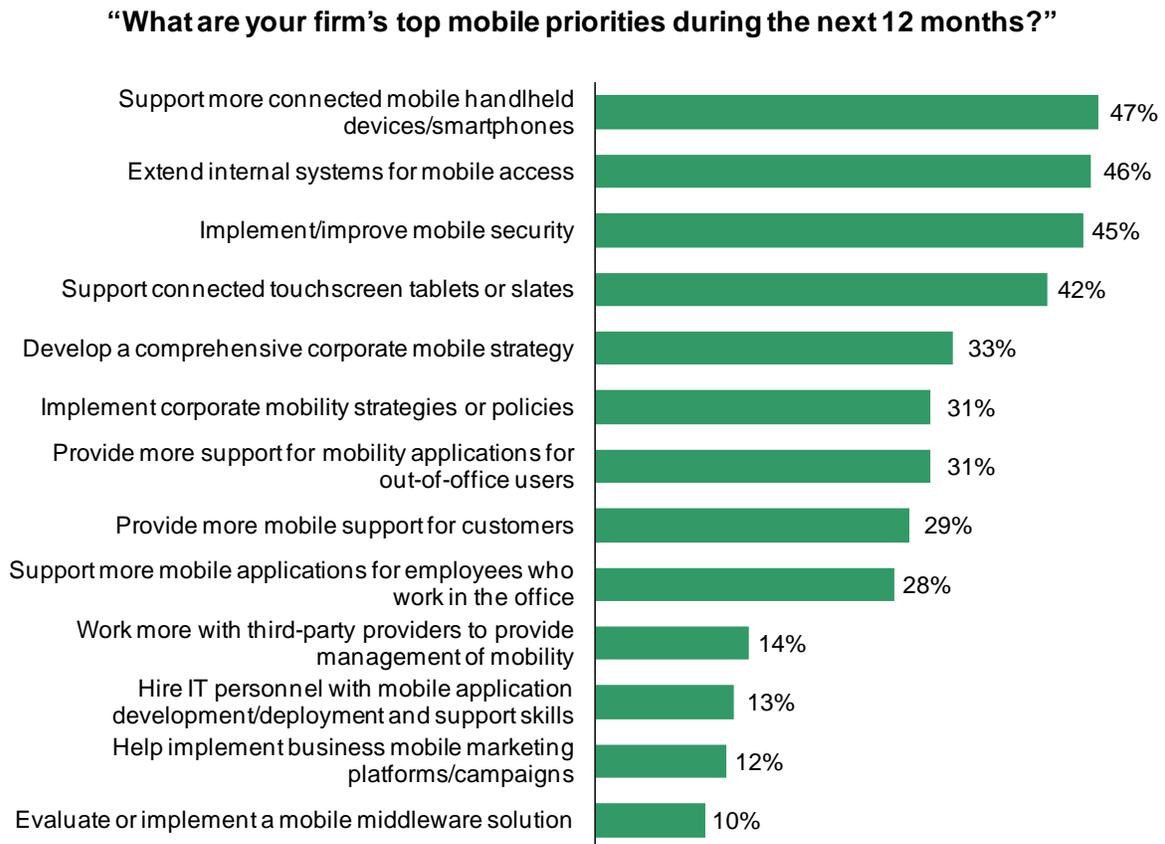
The increasingly mobile and remote workforce is driving many enterprises to support a wide range of mobile priorities as part of their overall corporate mobility strategy (see Figure 1).

- **Expanding the range of connected mobile devices is a key priority for many enterprises.** Between 42% and 47% of firms are expanding the breadth or depth of connected device support for employees. One of the principle requirements for these connected device activities include supporting more handheld devices, smartphones, and tablets that may run on new types of mobile device operating systems from Apple and Android. In addition, many firms are also concerned with improving mobile security of these devices.
- **Some firms are focusing on corporate mobility strategy and policy development.** Survey results show that 31% to 33% of companies are developing and implementing corporate mobility strategies and policies. As enterprises expand support for new types of mobile devices and applications, they are also investing time and resources into documenting their corporate mobility strategies and policies for employees, partners, suppliers, and customers.

- **Enterprises are also supporting more mobile applications.** Between 28% and 31% of firms are supporting more mobile applications for employees. These mobile apps include applications for road warriors and sales executives who work outside of the office, as well as mobile applications for employees who work inside the office. Examples of inside-the-office applications are mobile expenses and time sheets, which admin assistants can access while they are away from their desks.

Figure 1

Key Mobile Priorities Include Providing Employees With More Device, Application, And Development Support



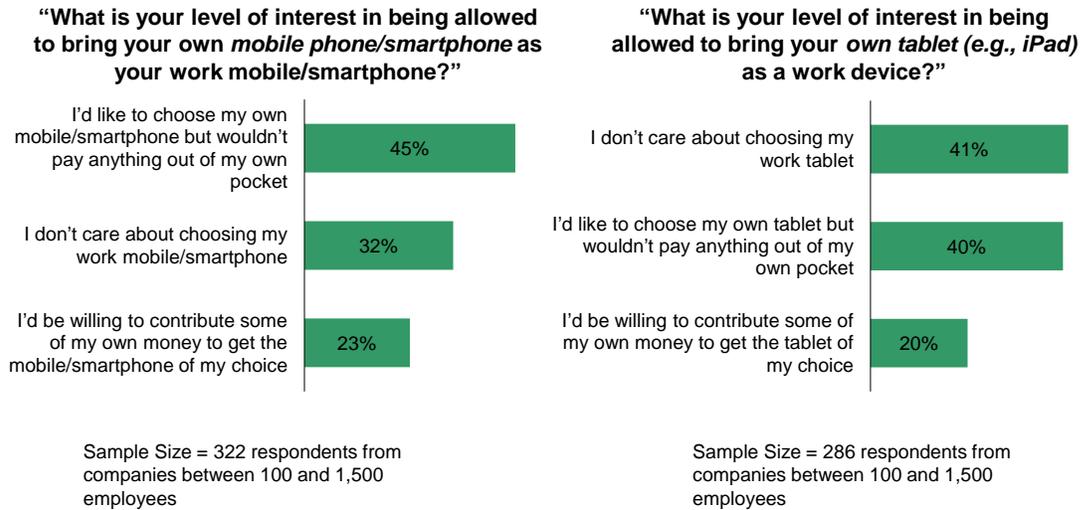
Base: 148 respondents from companies with between 100 and 1,500 employees in Europe and North America

Source: Forrsights Networks And Telecommunications Survey, Q1 2011

The corporate mobile device operating system landscape is becoming fragmented — with new mobile devices from Apple and Android making their way into organizations from a growing number of employees who purchase and pay for the smartphones or tablets they use for work (see Figure 2). Results from Forrsights Workforce Survey, Q4 2011, show that 45% of information workers are interested in choosing the mobile phone or smartphone they use for work, and 40% of information workers would also like to choose the tablets they use at work. Many employees are also willing to pay for these personally selected mobile devices. In fact, 23% of information workers are willing to contribute to paying for their personally selected mobile phones or smartphones, and 20% are willing to contribute to paying for their personally selected tablets.

Figure 2

Many Employees Want The Flexibility To Select And Purchase The Mobile Device They Use for Work



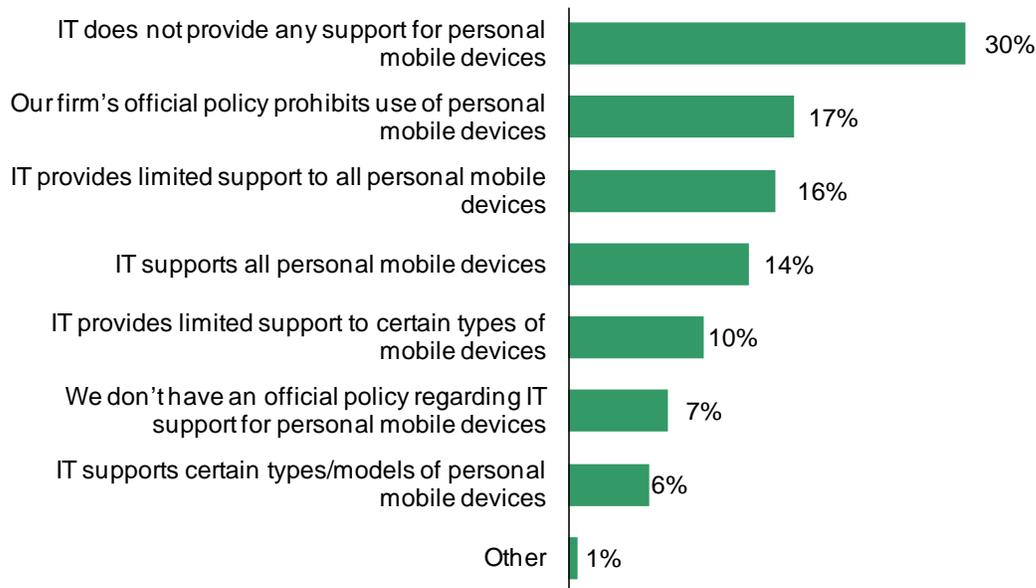
Source: Forrsights Workforce Survey, Q4 2011

The fragmented corporate mobile device landscape will gain momentum as more employees use their personally owned mobile devices to complete work activities. Forrsights Networks and Telecommunications Survey, Q1 2011, results show that 46% of firms provide some support to some personal devices employees bring into the office (see Figure 3). Support for personal mobile devices ranges from providing limited support to certain types of personal mobile devices to providing complete end-to-end support to all personal devices.

Figure 3

46% Of Enterprises Provide Some Level Of Support To Some Personally Owned Mobile Devices

“What is your firm’s official IT policy for supporting employee personally owned mobile devices (cell phones, smartphones, and tablets)?”
(Does not include laptops)



Base: 148 respondents from companies with between 100 and 1,500 employees in Europe and North America

Source: Forrsights Networks And Telecommunications Survey, Q1 2011

Enterprises Are Expanding Mobility And Collaboration Application Deployment

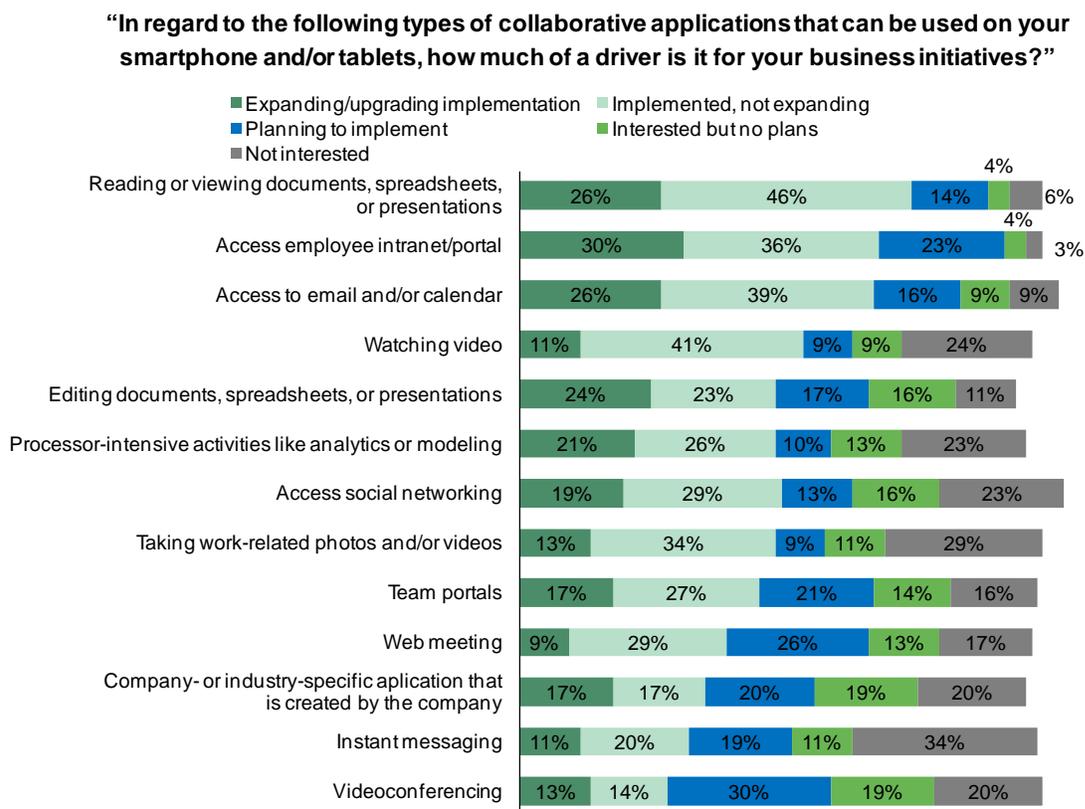
Many companies have implemented and/or are expanding their implementation of a wide variety of mobility and collaboration applications. In a survey commissioned by Cisco Systems, line-of-business decision-makers (e.g., from operations, sales, finance, and corporate management) identified the organization’s current and planned mobility and collaboration applications deployment for smartphones and tablets (see Figure 4).

- **Viewing documents and accessing employee portals, email, or calendars are widely deployed apps.** More than 70% of surveyed respondents have deployed applications that enable employees to view documents, spreadsheets, or presentations. In addition, push email remains a critical mobile application, and 65% of firms have implemented or are upgrading their implementation of this application. Another 16% of firms are planning to implement email or calendar applications.
- **Video and photo application deployment activities are gaining momentum.** More than half (52%) of surveyed organizations have implemented or are expanding implementation of applications enabling employees to watch videos on mobile devices. In addition, 47% of firms are implementing or expanding deployment of apps enabling employees to take work-related photos or videos. Thirty-eight percent of surveyed firms have implemented web meeting applications, and another 26% of firms are planning to implement these applications.

- Emerging demand for deploying many different types of applications.** Line-of-business decision-makers are planning to implement additional types of applications in the future. In fact, 30% of firms are planning to implement videoconferencing applications and 26% are planning to implement web meeting applications. Providing employees with access to intranet or portal sites is on the implementation plans for 23% of organizations, and 21% of firms are planning to implement team portal applications.

Figure 4

Enterprises Are Expanding Deployment Of Many Different Types Of Collaborative Applications



Base: 70 senior-level decision-makers at enterprises in US, Canada, UK, and Germany with between 100 and 1,500 employees
 Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, February 2012

Workers Use Their Smartphones And Tablets To Engage In A Variety Of Activities

Employees engage in many different types of work-related activities using their smartphones and tablets. There are commonalities as well as clear differences in the types of applications employees use on their smartphone and tablet devices (see Figure 5).

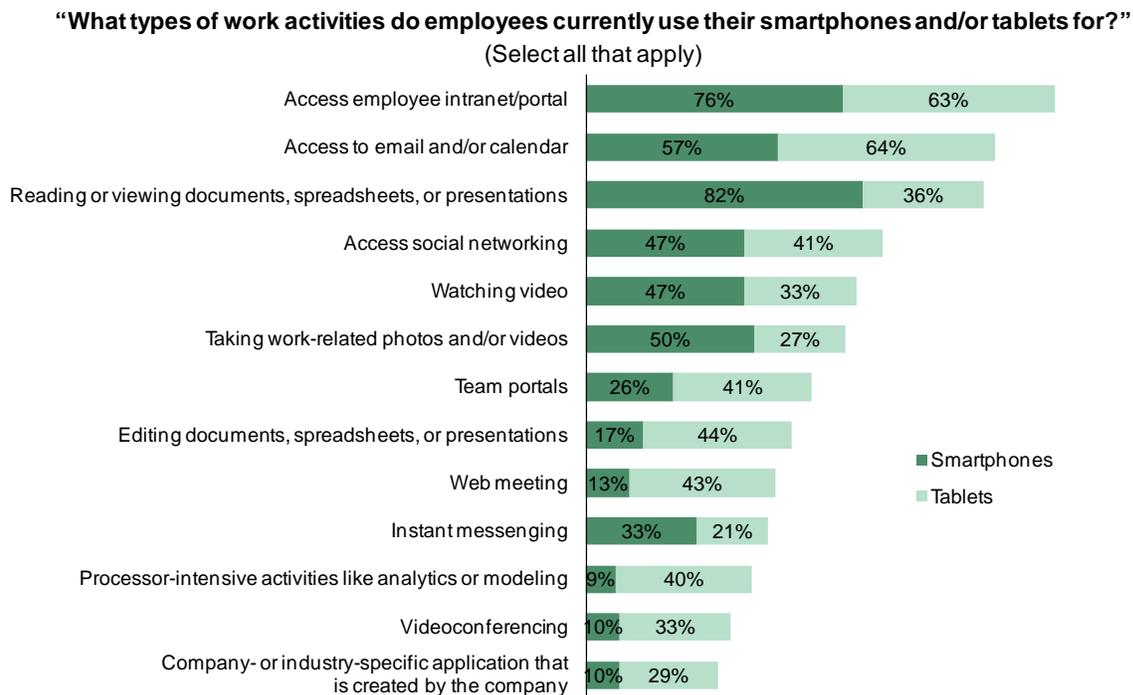
- Reading or viewing documents, spreadsheets, or presentations are top smartphone activities.** For some activities, one device dominates employee usage. For example, 82% of workers use smartphones to read or view documents, spreadsheets, or presentations, while only 36% of employees engage in these work activities using tablets. In comparison, tablets are much more likely to be used for editing activities as compared with

smartphones. In fact, 44% of employees use tablets to edit documents, spreadsheets, or presentations, while only 17% of employees report using their smartphones for these activities.

- Tablets are often used for analytics and modeling as well as to access web meetings and videoconferences.** Device form factors also impact employee adoption of particular activities. For example, the larger screen size and processing power of tablets makes these devices ideal for analytics and modeling activities, enabling access to web meetings, and supporting videoconferences. Survey results show that 43% of employees use their tablets to access web meetings, 40% engage in processor-intensive analytics activities, and 33% use tablets to access videoconferences. In comparison, only 10% to 13% of employees use their smartphones to engage in these activities.
- Accessing email, calendar, and intranet or employee portal sites lead the way for both devices.** Two of the top three work-related activities employees engage in are the same for smartphone and tablet users. Specifically, more than three-quarters (76%) of employees who use smartphones and 63% of tablet users access their employee intranet or portal sites using these mobile devices. Accessing email and calendar applications are also an important activity for employees. In fact, 57% of smartphone and 64% of tablet users access email or calendar applications from the devices they use at work.

Figure 5

Usage Differences Are Evident From Employee Adoption Of Activities On Their Smartphones Versus Tablets



Base: 70 senior-level decision-makers at enterprises in US, Canada, UK, and Germany with between 100 and 1,500 employees
Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, February 2012

Benefits And Challenges To Mobile App And BYOD Deployment Must Be Evaluated

As firms expand the breadth of mobile applications and collaboration services deployed to employee-owned devices, they must evaluate the benefits and challenges associated with supporting these initiatives. So, what types of benefits have business units achieved from deploying mobile solutions (see Figure 6)?

- **Increased employee responsiveness, decision-making speed, and issue resolution are key benefits.** The top benefit to deploying mobility solutions for smartphones and tablets are increased employee responsiveness and decision-making speed, with 76% of respondents identifying these benefits to mobility solution implementation. In addition, nearly 60% of firms indicate that faster internal issue resolution is a benefit experienced as a result of deploying mobility solutions for smartphones and/or tablets.
- **Customer-focused benefits are also achieved from mobility solution implementation.** Between 43% and 46% of survey respondents identified customer-related benefits, such as faster customer issue resolution and improved customer satisfaction, as key benefits to implementing mobility solutions for smartphones and tablets.

Figure 6

Improving Employee Responsiveness, Issue Resolution, And Customer Satisfaction Are Key Mobility Benefits

“What benefits, if any, has your business unit or organization experienced as a result of deploying mobility solutions around smartphones and/or tablets (e.g., mobile devices and/or mobile applications)?”
(Select all that apply)



Base: 70 senior-level decision-makers at enterprises in US, Canada, UK, and Germany with between 100 and 1,500 employees

Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, February 2012

Firms that are deploying BYOD programs to support employees' personally owned smartphones and tablets must address some key issues (see Figure 7).

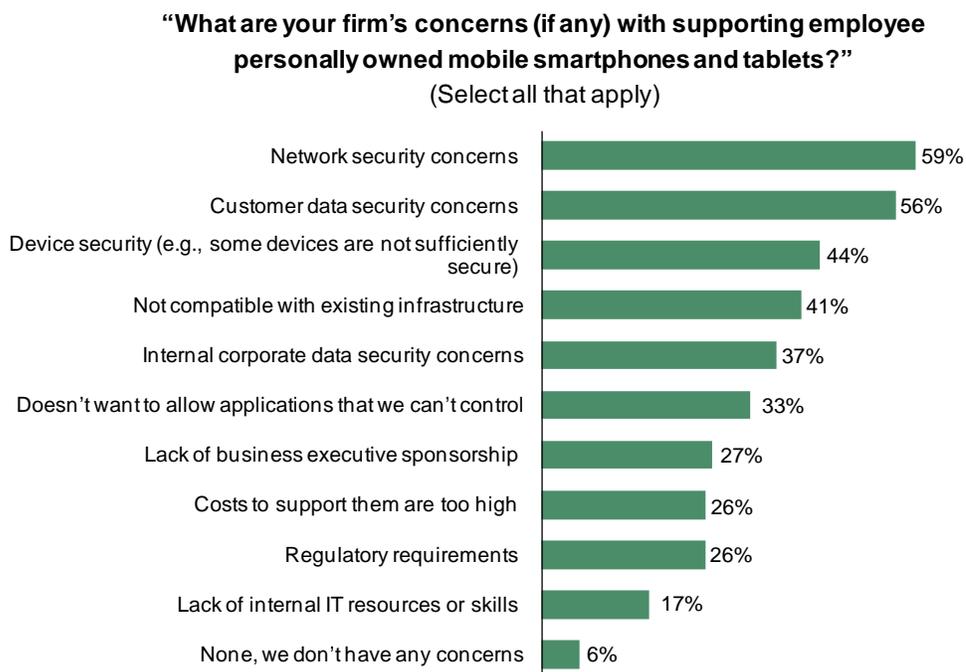
- **Network and customer data security concerns are top issues.** As momentum for supporting employee-owned devices builds, firms must consider the security implications of allowing personal mobile devices into

the office. Between 56% and 59% of surveyed organizations are concerned with network and customer data security issues. Securing customer's personally identifiable information is particularly critical because it is critical to validate the identity of individuals who are watching and receiving a particular application, content, or service.

- **Device security is an issue as new types of mobile devices and operating systems are supported.** As an increasing number of firms open their doors to new types of mobile devices, operating systems, and solutions, there is increased demand on ensuring security across all types of devices. Enterprises must ensure the security of new types of mobile devices, form factors, and operating systems (e.g., iPhones, Android devices, and iPads). For example: How will firms deal with devices that are lost or stolen? How will firms ensure that corporate content on personal devices is wiped when employees leave the organization or change jobs?

Figure 7

Security Concerns And Compatibility Issues Are Key Challenges To Supporting Employee Owned Devices



Base: 70 senior-level decision-makers at enterprises US, Canada, UK, and Germany with between 100 and 1,499 employees

Source: A commissioned study conducted by Forrester Consulting on behalf of Cisco Systems, February 2012

Firms Must Prepare For Mobile Application, Solution, And BYOD Program Momentum

Mobility initiatives are a key component to overall corporate strategic initiatives, and many firms are expanding their support of mobile devices and solutions. A key factor driving this mobility expansion is the growing trend for firms to support employee personally owned mobile smartphones and tablets.

- **Expect line-of-business decision-makers to expand their mobility initiatives.** Requirements for corporate mobility initiatives are no longer the sole responsibility of the IT organization. Line-of-business employees

from many different organizational units (e.g., sales, operations, corporate executives, etc.) are increasingly involved in guiding mobile device, application, and service requirements for their individual business units.

- **Prepare to support employee-owned smartphone and tablet devices.** Many workers would like to choose the smartphones or tablets they use for work, and some of these employees are also willing to paying for these personally selected mobile devices. The fragmented corporate mobile device landscape will gain momentum as more employees use their personally owned mobile devices to complete work activities.
- **Broaden the range of mobile applications and services deployed to employees.** Line-of-business workers and employees are pressuring enterprises to expand the variety of mobility and collaboration applications. Leading applications and services used by employees vary depending on the type of device. Viewing documents and accessing email or calendar are broadly deployed across both smartphones and tablets. However, video, IM/conferencing, and analytics applications are more prevalent among tablet users.

Methodology

This Technology Adoption Profile was commissioned by Cisco Systems. To create this profile, Forrester leveraged its Forrsights Networks and Telecommunications Survey, Q1 2011, and Forrsights Workforce Survey, Q4 2011. Forrester Consulting supplemented this data with custom survey questions asked of 70 North American and European senior-level decision-makers who are responsible for mobility decisions around smartphones and/or tablets at organizations in the US, Canada, UK, and Germany, with between 100 and 1,499 employees. Survey questions were related to the benefits, concerns, activities and drivers of using smartphones and/or tablets in the workplace. The auxiliary survey was conducted in January 2012. For more information on Forrester's data panel and Tech Industry Consulting services, visit www.forrester.com.

Endnotes

¹ The base is 148 respondents from companies with between 100 and 1,500 employees in Europe and North America. Source: Forrsights Networks And Telecommunications Survey, Q1 2011.

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