

Enterprise mobility and the impact on the workforce

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About Ovum



- Leading independent global IT & Telecoms Research & Analysis firm
- 150 analysts covering a broad set of technologies and markets
- Provides strategic advice to telecoms operators, IT vendors, service providers, and enterprise IT leaders
- Headquartered in London (UK)
- 3 year history of investment in understanding consumerization behaviors

Agenda: the two big things that are driving change, what they mean for the enterprise, and what's coming next



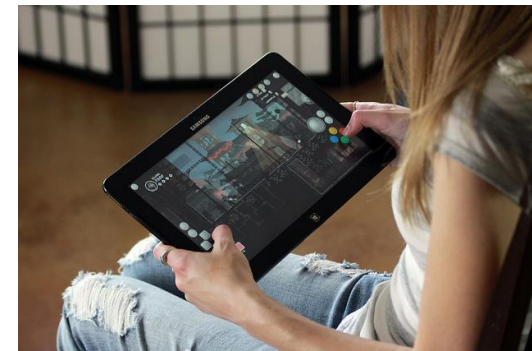
- The rise of enterprise multi-screening
- Mobile apps drive the next phase of enterprise mobility
- What the Mobile First world means for businesses: finding the right strategy and solution
- What's coming next?

The rise of enterprise multi-screening



The world is changing

- By 2017 there will be, in active use across the world:
 - **Almost 3 billion smartphones: companion devices that never leave our side**
 - **Almost 2.2 billion PCs and Tablets: powerful and highly portable**



Does this look familiar?



© marketoonist.com

How about this?



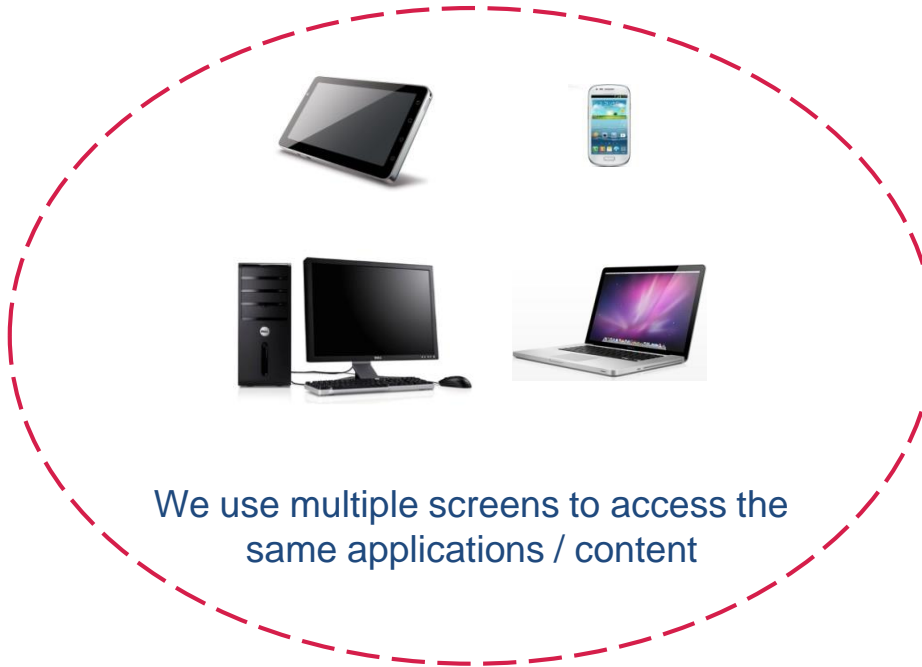
People use multiple screens in all areas of their life



Personal apps

Blurring lines: personal and work apps

Work apps



77.0%

of full-time employees, who are smartphone owners, use their smartphone for work (not incl. calls/SMS)

69.2%

of full-time employees access corporate data from a personally owned smartphone or tablet



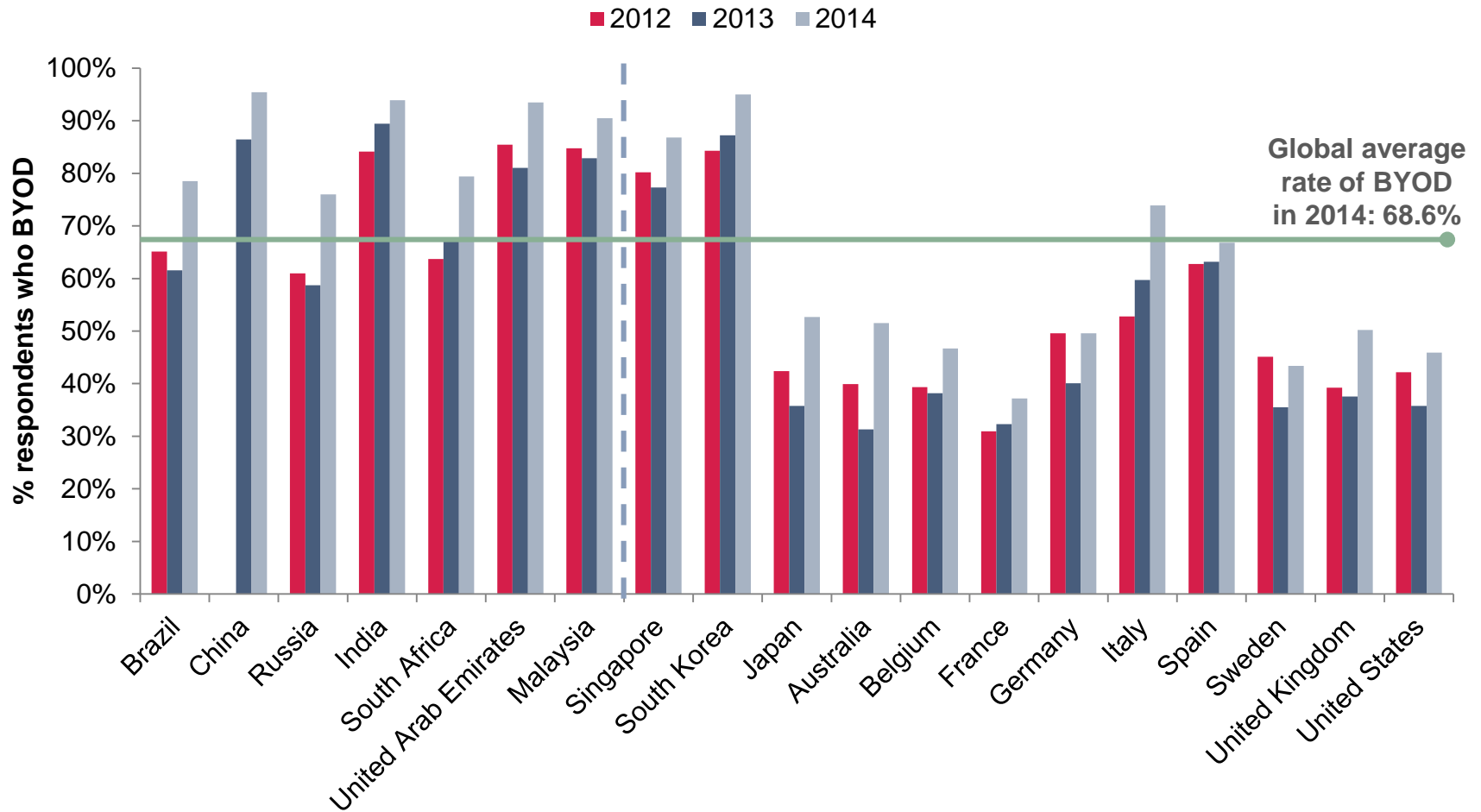
66.4%

of full-time employees, who are laptop owners, use their laptop for work occasionally

68.8%

of full-time employees, who are tablet owners, use their tablet for work

BYOD happens everywhere...



Source Ovum: Employee Mobility Survey 2012 (N=4,038), 2013 (N=4,371) 2014 (N=5,187)

Mobile apps drive the next phase of enterprise mobility



Apps are already a big deal in the consumer space...



Windows phone

- The Apple App Store contains more than 1.2 million available apps
- Over 75 billion iOS apps have been downloaded
- Almost 1.4 million Android apps available on Google
- 2.5 billion Android apps downloaded every month – overtaking Apple
- The Windows Store now has over 415,000 apps – across PC and mobile



... And are making the move into the enterprise



- It makes logical sense that, like devices, apps would follow from the consumer space into the enterprise
- To this point, enterprise mobility has largely revolved around mobile email. Apps can enable people to perform core tasks outside of email while on the move, representing the next step in the evolution of enterprise mobility
- Some businesses are already using them to modernize and mobilize business practices – but these organizations are the pioneers
- We expect to see this market really pick up over the next 24 months

Vertical use cases for B2E mobile apps that we see already: Healthcare



- Doctors are replacing traditional clipboards with tablets to get access to more data in one place
- Provides extra interactivity options, showing x rays for example...
- Alongside patient history



Vertical use cases for B2E mobile apps that we see already: Pharmaceuticals



- One of the first use cases we came across: pharma sales reps carrying tablets instead of brochures
- Quick access to all products and saves on paper
- Can show off most relevant products without prior knowledge of what the Doctor might be interested in

Vertical use cases for B2E mobile apps that we see already: Insurance



- Claims agents becoming more efficient with tablets and bespoke apps
- Can take pictures and upload data from the scene – do not need to return to the office to do paperwork
- Agents are able to visit 50% more sites per day



Vertical use cases for B2E mobile apps that we see already: Banking / Finance



- A range of back-office and customer-facing functions mobilized:
- Perform and monitor trades
- Look up foreign exchange rates
- Organize customers through customized profiles

Vertical use cases for B2E mobile apps that we see already: Retail



- Customers today are more knowledgeable than ever
- Shop assistants use smartphones and tablets to access stock information, price comparisons
- Can also be used for mobile points of sale



Vertical use cases for B2E mobile apps that we see already: Aviation



- Flightbooks are being replaced with tablets
- Saves on fuel, they can also be updated easily and regularly
- Cabin crew also using apps to improve customer service e.g. in-flight seat upgrades

Making beautiful apps: user experience is key whether you are dealing with customers or employees



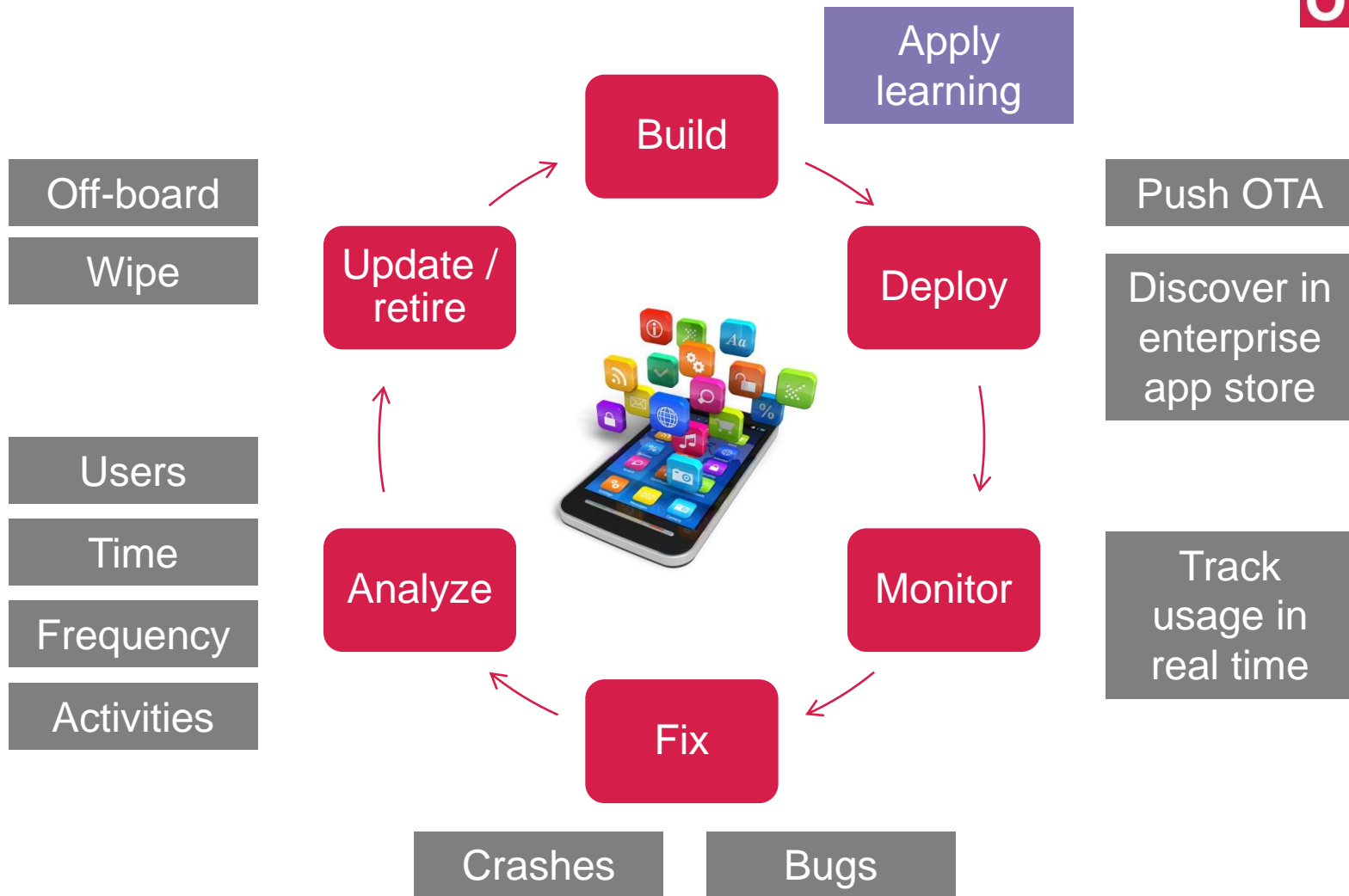
- People like apps that “just work”: slick, fast, easy to use, don’t crash, aren’t buggy
- If an app doesn’t work as it should the scenario is simple: people stop using it
- So it’s vital that attention is paid to creating a fantastic user experience for both B2C and B2E apps
- In the consumer space, bad apps can mean losing customers
- In the enterprise space, bad apps can mean low adoption / usage – and that means no ROI

Developers will start working with mobile devices in mind first over larger screen form factors



- For software developers, “mobile first” can mean literally that: developing for mobile first
- As small screen devices become the most common way for applications and services to be accessed, it becomes increasingly important to get the right experience on those devices
- Adapting applications from a large screen to a small screen is not as easy as doing it the other way around
- For software developers, “mobile first” can mean literally that: developing for mobile first
This will help to meet the growing demand for B2C, B2B and B2E mobile applications

Making the most of enterprise apps: managing the full lifecycle



What the Mobile First world means for businesses: finding the right strategy and solution



Mobile will be the first point of contact between a business and its customers

- It almost goes without saying that a strong mobile presence is vital for any business
- Customers will still use multiple screens to access services – this does not mean the death of the PC
- But increasingly that first point of contact will be via mobile as these devices are a new “digital limb”
- So the mobile customer experience must be just right – or you stand to lose out on doing business



Mobile will be the first point of contact between a business and its employees



- Mobile consumerization and the onset of BYOD means that more employees are mobile than ever before
- All employees are consumers first and foremost – they will bring those habits and expectations into the workplace
- Mobilizing core tasks will address those expectations, enable flexible working, and increase engagement and productivity



There is no one-size-fits-all strategy for mobility



- Ignoring mobility is not an option, but it's not simply a case of opening up to BYOD
- Every organization is different, and must find the strategy that best suits their needs
- Issues to take into account:
 - Existing employee behavior and demands
 - Attitude and approach to data security, and risk
 - Regional and vertical legislation
 - The organization's desire to cut costs...
 - Or it's view of mobility as a long-term strategic investment

Ovum's rough guide to mobile strategy and solution suitability



Highly suitable Occasionally suitable Unsuitable

	Strategy			Solution		
	BYOD	CYOD / COPE	COBO	MDM	MAM / Container	Virtualization
	Company that wants to embrace existing behavior	Highly suitable	Highly suitable	Unsuitable	Occasionally suitable	Highly suitable
Company that wants to cut costs	Occasionally suitable	Occasionally suitable	Highly suitable	Occasionally suitable	Unsuitable	Highly suitable
Company that views mobility as a long-term strategic investment	Occasionally suitable	Highly suitable	Occasionally suitable	Occasionally suitable	Highly suitable	Unsuitable
Company that has a low appetite for risk	Unsuitable	Occasionally suitable	Highly suitable	Highly suitable	Occasionally suitable	Highly suitable
Company that has stringent regulations to comply with	Unsuitable	Occasionally suitable	Highly suitable	Highly suitable	Occasionally suitable	Highly suitable

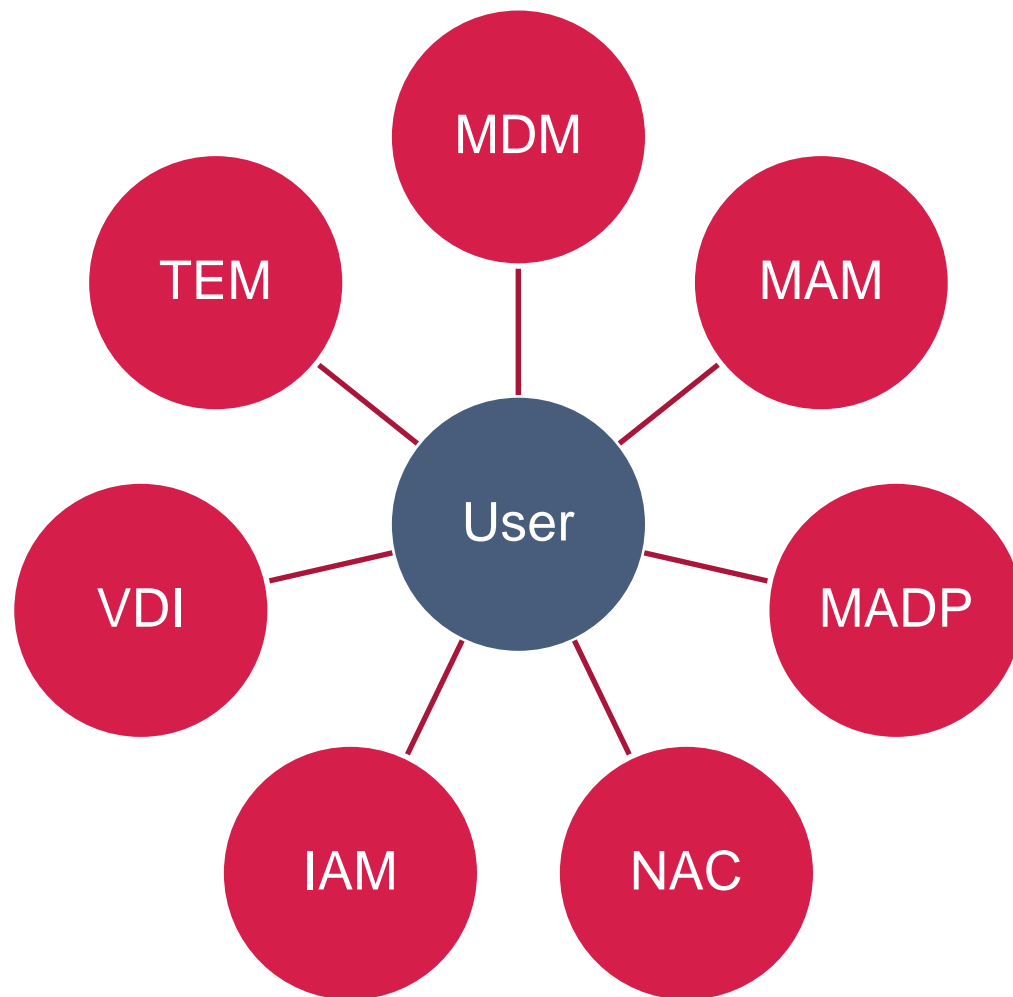
Source Ovum report: *Beyond BYOD – how businesses might COPE with mobility*

Preparing businesses for a Mobile First environment



- Do employees have the right devices to get their jobs done?
- Do employees have access to the right applications from all these devices?
- Does the business have the required expertise or services to manage and secure all of these devices?
- Is the proper infrastructure in place to support these devices, applications and services – both in and outside the office?

A complete managed mobility solution has multiple components – addressing the variety of enterprise demand



- Mobile Device Management
- Mobile Application Management
- Mobile Application Development Platform
- Network Access Control
- Identity & Access Management
- Virtual Desktop Infrastructure
- Telecoms Expense Management

What's coming next?



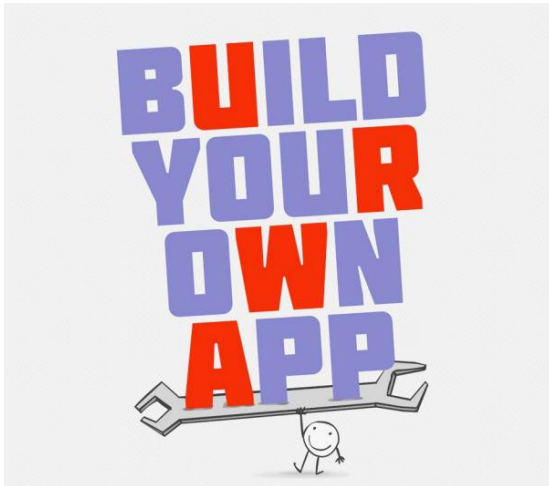
The Internet of Things: Wearables

- Wearables are the hot new thing in the consumer space...
 - (Well, at least among us geeks!)
- Given the patterns seen in the smart device and application space, this leads us to think that they will find use cases in the enterprise before too long
- For now there is not much evidence of these devices having an impact on everyday working life
- We expect use cases to be found by individuals and line of business managers, much like we have seen with BYOD and BYOA
- Again, it will be up to enterprise IT to manage this innovation as it happens, enabling users where possible while maintaining control of corporate data



BYOA: from Bring Your Own to Build Your Own App

- We know that people are finding their own apps to use for work...
- But might they start *building* their own?
- We've come across one or two firms starting to offer easy drag and drop development environments for non-developers to create simple apps
- Could be great for business users – but increases the challenges around Shadow IT



A large, 3D-rendered graphic of the word "Questions" in a bold, red, sans-serif font is centered on the page. The word is surrounded by numerous smaller, light gray, 3D question marks scattered across the background, creating a sense of inquiry and uncertainty.

Questions