Power to the People: Identify and Empower Your Mobile Workforce

A Three-Phase Strategy to Serve Mobile Workgroups

June 7, 2012

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Includes input from 27 ecosystem contributors and survey data from 74 mobile program managers

Executive Summary

One-in-two mobile owners in the US owns a smartphone, and many more own tablets.

As most of these same consumers adapt their personal lifestyle to be "mobile first," they expect their employers to be there to meet them. With the growing number of personal mobile devices in the hands of users, as well as increasingly remote organizations , there's a great opportunity for organizations to increase productivity of their employees by allowing the use of these personal devices. Taking this on seems daunting, as IT has less ability to enforce a single standard than ever before. Not taking action, however, and ignoring this trend risks exposing corporate data to public clouds with no visibility on the part of IT. Enforcing a single standard will do a lot to serve all users partially, but none particularly well.

Our research has exposed the fact that most organizations are concerned about taking inherently mobile roles, such as sales and field service, mobile first. These groups have distinct needs around not just consuming mobile on devices, but also creating and sharing information. They're collaborators, as over 60% of the companies that we interviewed in a survey on attitudes around mobile tools reported this was a pressing need. Executives, technical workers, and contractors — those workers who need to take their data, apps, and (sometimes) even their whole computing experience with them wherever they go were the second-most-important group to mobilize in the eyes of our respondents. These users demand near-full-feature desktop computing via the mobile devices they carry, and yet another set of solutions makes sense to accomplish this. Lastly, but no less important, come the information workers — those employees simply seeking a parity of information access from the mobile devices they take with them in and out of the office. Perhaps the largest group, this set of workers takes third-tier priority in going mobile and needs yet another suite of tools entirely.

Making sense of the growing number of offerings to serve these various constituencies grows harder with every new market entrant we see. The bad news is that the market will get more crowded; however, this is a short-term symptom of its nascence. We'll ultimately see consolidation and — in the long term — constriction in the mobile tool market. This doesn't diminish the need to act now. The solution? Assess what's already in-house through a mobile audit; get a handle around the various roles in the organization that need to be mobile and what their specific needs are; and prioritize the selection of vendor partners offering mass market tools to serve these users in order of need.

Methodology

We conducted both qualitative and quantitative analyses, using a combination of online survey, interviews, briefings and research on existing enterprise mobile programs. Specifically, we conducted:

- An online survey of 74 mobile program managers from companies of all sizes and industries. The survey was fielded through several sources including Twitter, Facebook, analyst blogs and Altimeter Group's blog and monthly newsletter.
- 9 research interviews with corporate mobile strategy and IT practitioners.
- 18 briefings with mobile solution providers and vendors.

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The Definition of Mobile Strategy Has Changed

It was not long ago that the definition of mobility inside many organizations meant installing a BlackBerry Enterprise Server (BES) and giving employees on-the-go access to email, contacts, and calendar. Serving users with mobile is no longer about these basic functions any more. As Apple's iPhone and Google Android handsets began to grow in number, it became clear that users wanted more. Within one large law firm that we spoke with, in the course of one year, the company went from 100% BlackBerry devices for mobile users to just 5% — the other 95% were all iPhones. As mobile application ecosystems continue to flourish, supporting mobile users is no longer about email.

We now have 1-in-2 mobile phone users in the US carrying a smartphone, and there is a growing base of tablet users as well. The "computer" of yore in the workplace has been redefined, and providing that basic tool alone is not enough to keep workers productive and connected to the information and tools that help them compute day-to-day. Ninety-four percent (94%) of CIOs believe that enterprise mobility will be an important part of their enterprise IT strategy over the course of 2012 . Despite the focus on the importance of mobility, many organizations are missing an opportunity. When asked about support for employee-owned devices, the same group of CIOs noted that the devices were not supported in 27% of firms represented. Further, less than half of these firms only offered "limited support" for those devices. Today, mobile email contact and calendars amount to "limited support," and users won't sit idly by and settle for this type of limited connectivity.

Mobile Makes IT's Job Harder, But Makes the Company Better

Enterasys Networks competes in the networking space and makes its name selling CIOs on the need to simplify their business. The company has a multi-national sales force that has increasingly gravitated to iPhones, iPads, and Android devices. It's a natural turn of events, and one faced by many companies in various industries. But Enterasys sells a message of simplicity and manageability to its clients. The company must walk the walk.

Ben Doyle's job was getting a lot harder on account of mobility. Ben, Director of IT Applications at Enterasys, was trying to keep the company's multi-national sales force productive and connected on the devices they were increasingly bringing into the organization.

"We started getting requests from [people in the field] to get them tools to help them do their jobs," he says. "Employees started using Dropbox to solve the file access on mobile device issue."

Dropbox, which the firm considered too close to consumer grade for their purposes, was just one of many tools that users were adopting to solve the problem of getting their jobs done while being "mobile first," as Ben describes them. "We'd tried for years to get SharePoint to serve the needs of [mobile] users, but it wasn't really well-suited to work on [mobile] devices."

Proactive Steps Empower Users, Mitigate Risk

The problem was twofold: Existing tools didn't follow users onto their mobile devices, and users' decisions around the apps that would fill the gap were not up to snuff for IT. While Enterasys, with a mandate to go "cloud first" with its IT strategy, is a leader, and driven by the pressures unique to its market is a harbinger of things to come.

Ben and the Enterasys IT team ultimately have settled on a suite of tools that work seamlessly with mobile — some even driving larger technology decisions to update underlying systems. Salespeople are able to make use of Enterasys' implementation of Box collaboration tools, and information workers in departments like finance are Ben's next target. This did not happen through pure force of will, however. The Enterasys process was predicated on varying user needs across departments, evaluating the mobile work styles and preferences inside of the organization, and adopting tools that keep employees productive and IT at the reigns of mobility.

A Role-Based Approach in Three Steps

Organizations looking to replicate the success Ben and his team enjoyed need to understand the three steps to choosing the right tools for their workers.

Figure A: Three Steps Towards Mobilizing Roles

Source: "Power to the People: Identify and Empower Your Mobile Workforce" Altimeter Group, June 7, 2012

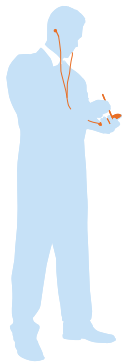
Our research shows that failing to take action results in unproductive mobile users who actively escalate enterprise risk. However, choosing a single solution for the entire organization and dictating a standard is a simplistic approach to the problem of mobility. Successful strategies start with understanding the constituencies inside the organization, because different roles will have different mobility needs.

Empowering, One Role at a Time

All users are not created equal, however, and taking a roles-based approach to mobile is critical to serving users in your organization with the tools that will help them do their jobs. Altimeter has identified the three most common use cases for workers inside of organizations, each with its own unique need for access and tools from a mobile device:

Figure B: Role-Based Mobile Use Cases

Information Worker



Need → Consume

The information worker is one of the most common roles inside of most organizations. Whether finance or HR, engineering or marketing, these employees thrive on information access and consumption, and are increasingly looking for it on the go. Whether keeping connected during meetings or extending their workday in the AM or PM, having the ability to access and consume information on the mobile platform they choose is critical.

Field / Sales Worker

Need → Collaborate

Field service and sales professionals live on the road for the better portion of their days. They gather information and even create new IP in the field and need to share it with the home office, colleagues and customers. They need to be able to interact with files as they would on a PC, while they're relying on a tablet or smartphone—increasingly their device of choice.

Executive / Technical Worker

Need → Compute

The executives in many organizations led the charge toward mobility by retiring their laptops for tablets in order to be more mobile moving from meeting to meeting and often on the move. Technical workers, on the other hand, like those in IT, are most effective when they're close to their constituents. Both groups demand interacting with a mobile device—most often a tablet—as if it were their only PC. For a growing number, it is.

Source: "Power to the People: Identify and Empower Your Mobile Workforce" Altimeter Group, June 7, 2012

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- **Consume**: Users inside of organizations are looking to access corporate information on the go, whether this is the company directors or maps of a customer site, many users crave properly formatted information from their mobile device. These information consumers are seeking information that, while largely static, is accessible and digestible on their device of choice. Their focus is consuming information.
- **Collaborate**: Many workers who are the focus of mobility efforts inside their companies are looking to share and access information. They may be creating information in the field, such as notes, drawings, recordings, and photos, and need a path to access and store information on corporate data stores. Current tools in place, such as Microsoft SharePoint, rank poorly among these users and the IT departments that support them due to a lack of support for popular mobile platforms like Google's Android and Apples iOS. These users need a way to collaborate with one another and with the mothership.

- **Compute**: The top tier of executive, heavy travelers, and, increasingly, temporary workers (like contractors) are looking to tablet devices, such as the Apple iPad, to be the only piece of tech they carry day-to-day. This group still needs to consume computing power, but is seeking to do it from the small, easy-to-carry device they already rely on for consumption and collaboration. An emerging class of solutions aims to give these users access to the enterprise applications, the corporate desktop, or both from the tablet or even smartphone the user is toting. These users are looking to compute form anywhere.

These use cases correlate with the roles we've identified as the focus of mobility efforts inside of the companies we surveyed for this research.

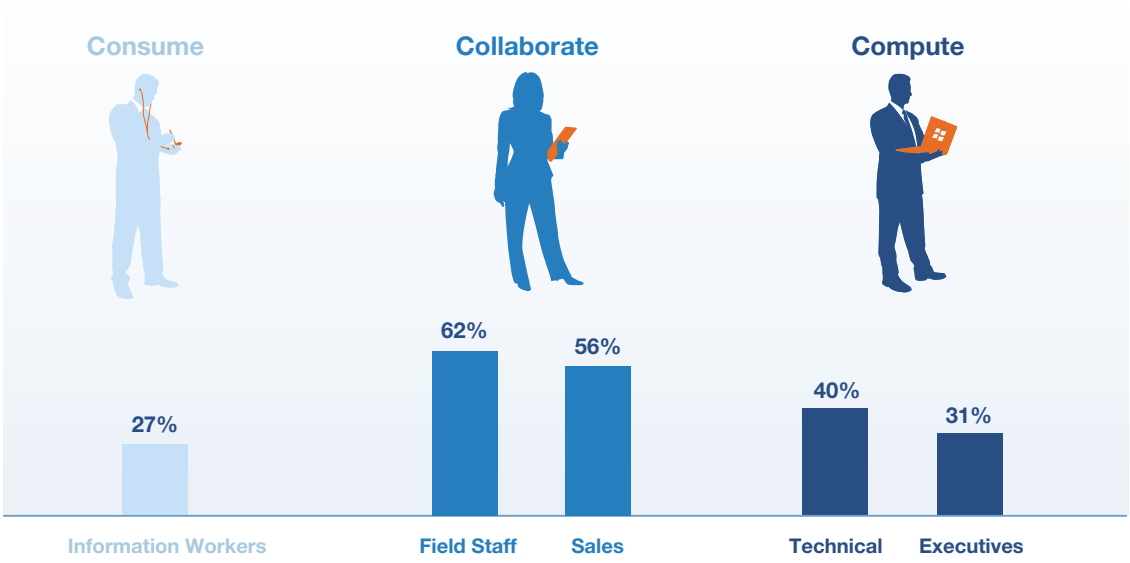
Power to Whom? Inherently Mobile Roles Go First

Undertaking research on the future of mobile workers, Altimeter sought to determine the roles inside of companies that were most likely to be "taken mobile" by their management. It was our hypothesis that a shift may be occurring and that, while traditionally mobile roles like sales and field service are largely already mobile, efforts were underway to serve larger segments of a company's user base with role-specific tools. This is clearly not the case.

Figure C: Sales, Field Service Lead in Mobility

Who benefits the most from the implementation of mobile tools in the organization?

Remote employees such as field workers and sales associates benefit the most from mobile implementation. These also tend to be those roles using mobile to collaborate.



Base: 74 companies surveyed by Altimeter Group Q2, 2012

Source: "Power to the People: Identify and Empower Your Mobile Workforce" Altimeter Group, June 7, 2012

Going Mobile, the Usual Suspects

It's often cited casually that mobile users are traditional road warriors, such as field technicians and salespeople. While hackneyed, that definition is largely true. Here's what our survey shows us about who's going mobile today.

- **Field Worker is Top Candidate to Take Mobile**: Among the top three roles most impacted by mobile, Field Staff ranked first, with 62% of our 74 surveyed organizations citing this class of worker as the one most likely to benefit from mobility. This is in keeping with historical norms, which show that we're still getting mobility to the highly mobile roles that need it most due to the nature of their day-to-day roles.
- **Sales and Technical Roles Round Out the List**: Coming in second, highly mobile Sales professionals follow field staff as the group expected to see benefits from mobility, as voiced by more than 50% of our respondents. Technical employees followed in third place, at 40%, as the role most likely to benefit from mobility. This is likely due to the need to support these professionals on many different systems and devices, a portability of computing environment being key to making this arrangement work.
- **Executives and Information Workers Come Later**: While many firms talk anecdotally about the executives showing up in IT with an iPad as being the watershed moment for mobility, the benefits of mobility for both executives and information workers trail those for revenue generating and mobile-by-nature employees in the organizations we surveyed but are still considered highly important to foster through mobility strategy.

It's Not That Other Roles Don't Matter, They're Coming Later

Most every organization we spoke with in our end-user interviews noted not only the intense drive for more mobile tools — to be expected as we see every other mobile device in the US being an app-capable smartphone — but also the potential upside of enabling these users. The next section highlights the use cases of three organizations who have adopted mobile for different roles in their organizations.

Case Examples: Enterprise Mobile

Case Example I: Higher Educational Institution, University

Computing Environment: Distributed physical and remote locations throughout Alaska.

Number of Employees: 33,000 students, more than 5,000 full and part-time staff

Devices: All types of devices

This university is based in Alaska and includes many remote locations, some as far away as Nome. With more students relying on iOS and other mobile devices as their primary computing platforms (even over laptops and traditional computer labs), the IT department knew it was time to provide its primary users (students) access to the content and tools they needed via mobile. Creating the ability to provide a parity of experience on mobile across multiple platforms was a central goal, but managing the mobile tail of enterprise software and systems while making organizationwide changes without throwing systems into chaos was paramount. Although not quite there yet, University of Alaska envisions Virtual Desktop Interface (VDI) driving a hardware-less desktop culture, where users (both professors and students) can compute from anywhere and leverage mobile in the classroom.

> "We did a survey around the university system asking people what mode they feel most comfortable with. We found most students preferred to use tablets to laptops; mobile vs. a traditional lab environment. We haven't stopped emphasizing desktop or PC, we're just trying to find the mix that would bridge everything to make it as seamless as possible for the end-user.

Case Examples: Enterprise Mobile

Case Example II: Mid-sized Legal Services Company

Computing Environment: Distributed physical and remote locations throughout the US.

Number of Employees: 370 employees

Devices: iOS, Android, Blackberry

With more attorneys and paralegals relying on iPads as their sole computing devices, Burr & Forman Law Firm responded to the increasing drive for iOS displacing BlackBerry due to the availability of productivity tools. As a legal firm, this meant IT must shore up its control plane to anticipate the collaboration and data access needs of users. Through implementing the proper tools, providing a library of legal applications, and offering ongoing support, the organization has been able to create a common level of access to all information from mobile, as well as effectively tie more systems together rather than having disparate point solutions upon which billable productivity rests.

> "We started with email because the younger associates wanted to use their iPhones to access work email. But they also needed to be able to do things other than just email, like access files on the fly and input data. These days, we have pretty strong adoption, and it is only growing. Our third-party Extranet hosting service enables easy doc/file sharing and has increased the ability to interact quicker and get things going back and forth faster."

Case Example III: Enterprise High Tech Energy Company

Computing Environment: Distributed physical and remote locations in the US, Canada, China, Australia, Spain, Germany, France, and Belgium.

Number of Employees: 7000 employees

Devices: All types of devices

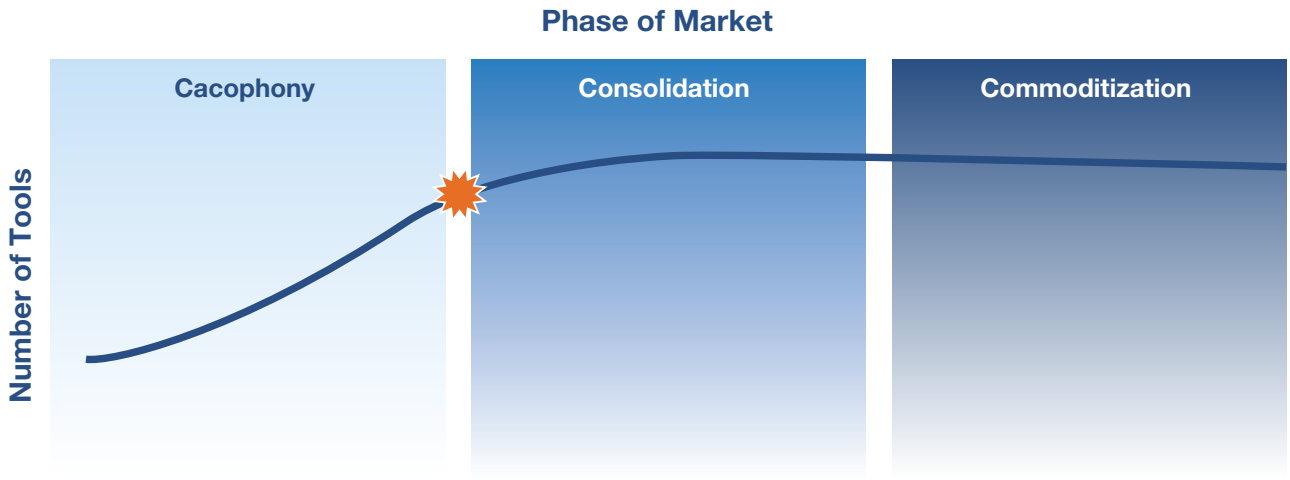
As a high-tech energy company with so many roles that are, by dint of their roles, mobile all the time, this organization deeply felt the need to improve time-to-resolution metrics of the IT staff. Despite 10+ years of mobility experience, many of the existing apps managed were not inherently mobile. As a result, the IT team had to build many apps from scratch to address the diverse needs for different roles. To reign in this massive suite of capabilities, they employ a single tool to manage, which has yielded significant monetary returns and time-efficiency. By providing admins, field engineers, salespeople, etc., the tools to bring processes closer to the actual work facilitates accuracy and increases efficiency for these roles.

> "We had many roles to consider, but we didn't look at roles first, we looked at capabilities first. To that end, we approached building from an app layer perspective, then device management layer, then connectivity. We empowered our admins to troubleshoot from many different angles and controls, not just report and analytics, but report access at any time. We're working on sales enablement applications by giving salespeople the ability to pull out their iPad and give them a pricing quote in their office. On the construction side, for contractors installing huge pieces of equipment, they have to validate they've conducted the test which they can now do on-site! The goal was simplification."

Don't Have it Figured Out? We're Still Early in Mobile

The mobile market, while heavy with investment and strategic focus, is still nascent today. It is currently entering its second of three phases, each phase providing distinct characteristics of maturity:

Figure D: Mobile Adoption Curve



The rapid ramping of smartphone ownership has begat a cottage industry of mobile tools Early market entrants offer a number of standalone products that focus on a single issue or pain. Most of the vendors in the market in this phase are are small, new market entrants and startups. There is a lack of expertise both in choosing and using these solutions due to their nascence. It is difficult to make any technology bets in this phase, as a result most organizations take a wait-and-see approach, rightly.

In the second phase the market dynamics change as does the number of solutions in market. Established technology solution providers enter the market to capitalize on continued interest and growing investment. This causes the number of solutions on market to balloon mid-cycle. Expertise in configuring and applying the technology grows, largely due to marketing and training initiatives from established first that begin to create partnerships with and acquisitions of standalone solution vendors. The number of solutions stabilize towards the end of this phase.

In its final phase, the market reaches stasis. The number of solutions in market slows and ultimately drops off as the rewards for playing in mobile diminish and product commoditize. Along with product homogeneity, talent for mobile strategy and management becomes commonplace and the disruptive market becomes a core element of the larger IT ecosystem. Solution choice in this final phase is likely dictated by larger technology investments and infrastructure constraints.

Source: "Power to the People: Identify and Empower Your Mobile Workforce" Altimeter Group, June 7, 2012

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We're currently entering the adoption phase in mobile. While mobile device management, data protection and other "control plane" technologies are in place — though to varying degrees. Anticipating the extension of mobile strategy beyond investing in just control technologies, the market has emerged from run-up and is crowding with vendors seeking to provide utility on mobile for different uses. More established vendor firms are entering the mobile space with offerings intended to extend product relevance and capture new investment. The market will witness still more new products and services as we continue to climb the maturity curve, though the growing numbers of choices means it is increasingly important to select a tool by tightly coupling existing roles and needs and match both to a solution, not delay technology that can provide returns now. The choice should be about fit to roles and uses, not about economy of choice.

The other element of maturity that is important to consider is whether the foundation for success is in place. The hypothesis we entered this research with was that companies were nearing the point where mobility strategy was being handed off from the IT roles to the line of business owners. In practice, however, most organization don't yet have the elements of a complete mobile control plane in place such that IT can step back and hand over the reigns of mobility.

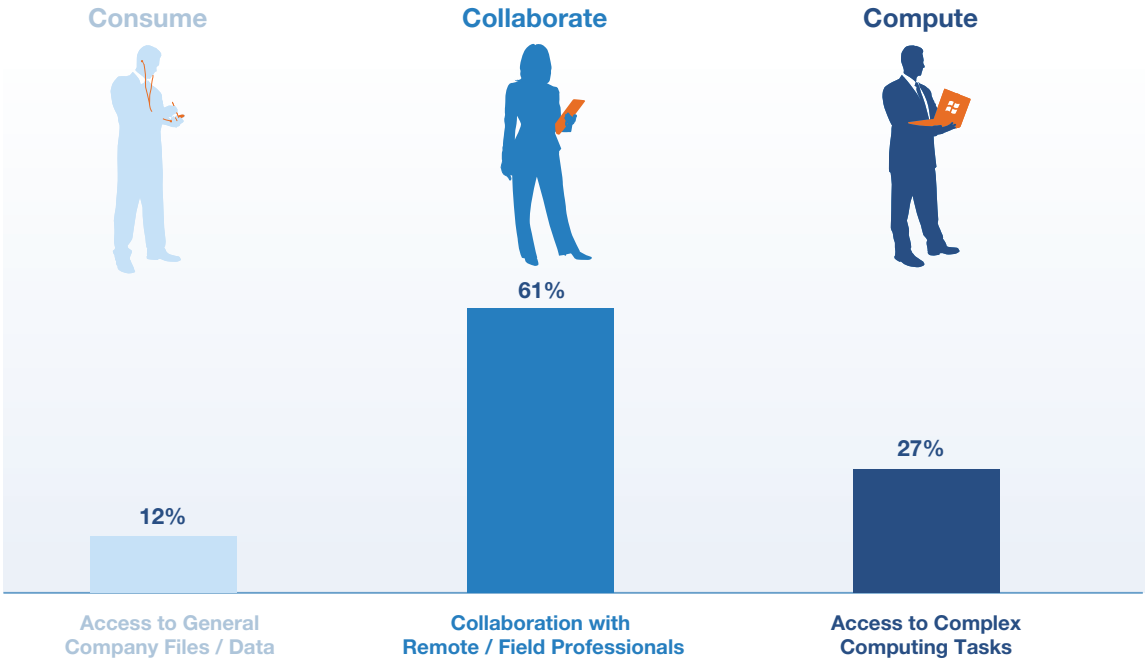
Each Use Case Demands Its Own Solution

Each role inside an organization is mated with a set of challenges or needs. Our research has shown that challenges mate very closely with our use cases set out at the beginning of this report and in our research hypothesis.

Figure E: Roles Most Impacted by Mobile

Rank the importance of the following challenges that organizations are using mobile to address with 1 being the most important and 3 being the least important.

Altimeter Survey data shows top enterprise mobile challenges correspond with primary use cases.



Base: 74 companies surveyed by Altimeter Group Q2, 2012

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Similarly to the distribution of workers' benefits in mobile, collaboration is the area most businesses are seeking help with; thankfully, the market is awash with solutions of this ilk, with vendors small and large and old and new jumping into the mobile collaboration pool.

Information Workers Need to Consume

In many organizations, the "average worker" is an information worker, someone who spends a good portion of their day accessing and interacting with information and data that is centrally located. These workers, while not inherently mobile by definition, are making a transition to mobile as their go-to platform for information in their daily personal lives and are looking to make that transition at work too. Whether they're trying to extend their day after hours out of the office or remain connected and accessible when moving from meeting-to-meeting, mobile is a key part of these workers' days. Altimeter convened a mobile roundtable asking users what their main pain points were in mobile. An information worker shared a telling example: "Sometimes I just want access to contact information … the contact details [from our CRM] from my mobile device. Why does something that simple not exist?"

Focusing on making information available for consumption by the largest portion of users — information workers — relies upon extending content management to take on mobile. Depending on the use case and the organization, a simple, standalone content management system that focuses on mobile may be enough; however, in organizations with more dynamic information and content stores and existing workflows, the solution may involve a deeper discussion around re-architecting enterprise content management. We see solutions of both types making a push to serve users looking to consume.

Figure F: Consumption-Focused Solutions

Consumption Solutions	
Definition	**Example Vendors**
Solutions in this category can be largely classified as content management or content presentation Solutions aimed at re-purposing content from a central store for access on devices and other computing platforms by users.	bMobilized Alfresco ModoLabs

Sales, Field Services Thrive on Collaboration

Sales, Field Services, and other highly mobile roles tend to see mobile not as an extension of computing, but as a means to replace clunky hardware — such as laptops, access via VPN or even desktop computers, and reams of paper collateral — with one device, a smartphone or tablet.

Figure G: Collaboration-Focused Solutions

Collaborative Solutions	
Definition	**Example Vendors**
Collaborative solutions are focused on the interchange of information contained in files and media with either a central information store on premise or off premise consisting of new, purchased storage or existing data stores like Microsoft SharePoint.	Accellion iongrid Yousendit Copiun DropBox Box

Mobile collaboration is a space that's seen such hot activity, it's threatened to overshadow just what mobile business applications are. We have long-time players in the space, such as Box, Dropbox, YouSendIt, and others, all making a play for the enterprise — though some more aggressively than others — and many succeeding in winning a roster of big names. Collaboration is a solid tool, and with the advent of extremely popular devices like the iPad that offer no access to a local file system, these apps have changed the use case of tablets from being tools solely for consumption to tools focused on creation and collaboration.

That said, this space is dominated by consumer players looking to burnish their image either through new offerings in their product set — YouSendIt — or through beefing up enterprise criteria in areas like security — Box. Others have simply stated they're consumer plays that offer strengths that businesses should be paying attention to — SugarSync. Add to this the existing enterprise players that recently entered the game — Wyse PocketCloud and IonGrid, add to that cross-functional players like Citrix which offers collaboration tools through its ShareFile

standalone product which also powers file sharing among enterprise customers via its Receiver mobile app — and you've got a very crowded marketplace with little differentiation. We'll outline the best tools for a given challenge, and therefore role, in the following sections.

Executives, Contractors, Technical Users Need Mobile Compute

Inside of the organizations we interviewed, executives are often cited — anecdotally — as the users most interested in ditching their laptop for an iPad. Whether accessing a full corporate desktop via the mobile device – possible today – or enterprise applications either built for mobile or for desktop, replacing the laptop with a smartphone or tablet is a reality now. Our data shows that technical users — whether contractors doing part-time work for an organization or IT staff moving throughout a campus nearly continuously — need computing resources that are available anywhere and from any device. It will be a while before hybrid tablet/laptop combinations with full desktop OSs come to market; in the meantime, consuming desktop-class applications, or even the entire desktop computing experience itself on a tablet or smartphone is possible, with varying degrees of function and complexity in the solution. There is a relative dichotomy among solutions in this set, with consumer grade offerings like OnLive offering a static Windows desktop via iPad and vendors such as VMWare and Citrix offering Windows applications, and even multiple OS options on a mobile device for a near-endlessly customizable computing experience across many mobile devices. Though the latter require some back-end coordination with IT for the featureset found in, say XenDesktop by Citrix consumed on a mobile devices versus the relatively feature-shallow OnLive experience.

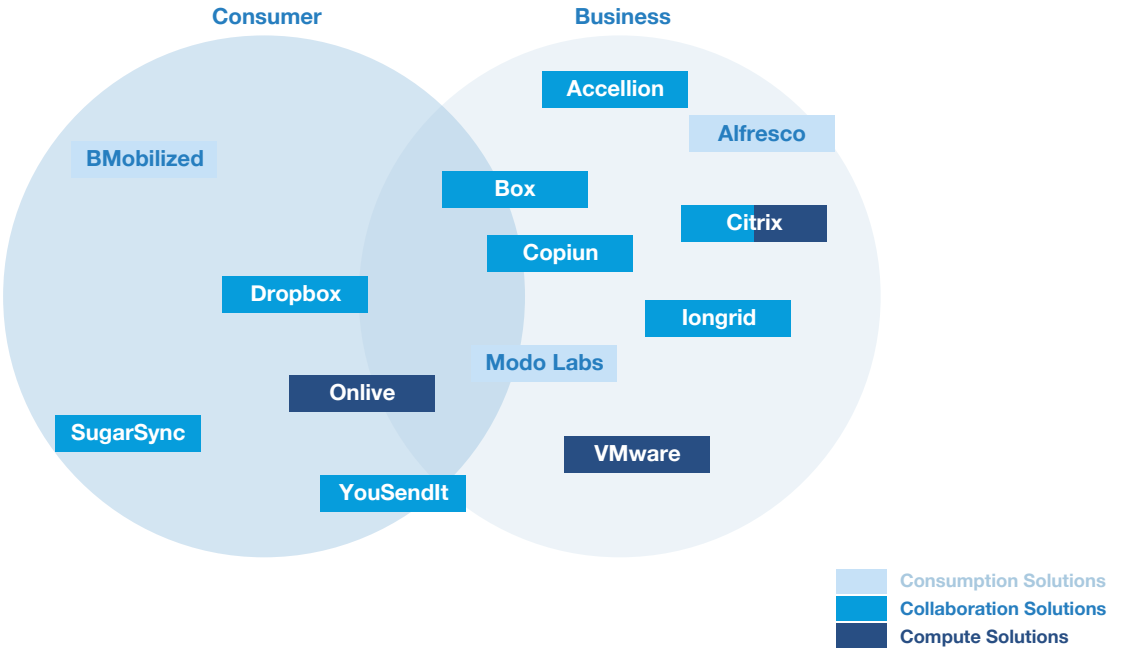
Figure H: Compute-Focused Solutions

Compute Solutions	
Definition	**Example Vendors**
Either extending via Virtual Desktop Infrastructure (VDI) or replicating applications or the entire computing platform on a mobile device, Compute Solutions focus on letting the user compute from anywhere, though complex, back-end infrastructure may be required to bring these solutions to fruition.	Citrix VMWare Onlive

Based on research conducted with vendors offering solutions at the time this research was conducted, Altimeter has grouped solutions in terms of their role as a business- or consumer-focused tool and their simplicity and complexity from an implementation standpoint.

This graphic is not meant to be an exhaustive overview of the market, but rather a gauging tool to understand the mix of consumer vs. business solutions in the market. Here are some notes on the differences among solutions available in the market today:

Figure I: Technology Provider Showcase



Key: Vendors listed in alphabetical order from top to bottom.

Source: "Power to the People: Identify and Empower Your Mobile Workforce" Altimeter Group, June 7, 2012

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- **Business vs. Consumer**: The distinction here is made based on the primary audience a solution targets. Most are looking to serve both categories of user; however, an example of Box vs. Dropbox, two companies offering similar solutions in function, is given where Box has invested in enterprise selling talent; a number of enterprise-class security tools, such as completing a SAS 70 audit; and partnerships with enterprise authentication vendor Okta. Organizations seeking a tool that offers enterprise-class protection of data, pricing with the inclusion of volume-based discounts for a large-scale rollout, and administrative audit tools should consider only those solutions that reside firmly in the "business" class of solutions.
- **Simple vs. Complex**: This distinction is made in terms of the ease with which a solution can be put into place in an organization, as well as its overall feature set. An example of the differentiation here would be a XenDesktop by Citrix solution, which offers managed, secure access to a user's stateful, personalized data, applications and even their desktop when mobile. The Citrix solution requires proper licensing for virtual applications and desktops and coordination with IT to implement the back end systems required to make a users apps, data and – if desired – desktop consumable from anywhere. Conversely, a much less complex – and thus less customizable solution for consumers such as OnLive allows a user to take advantage of a generic, virtualized Windows desktop on their iPad for computing on the go. But the mix of simplicity to complexity can be a double-edged sword for many companies.

Simple sharing of static information or basic cloud-based storage may solve real problems yet lack the complexity of other available solutions. A general rule of thumb, avoid complex consumer solutions and simplistic business solutions to ensure that features and functions match the price point for a solution. It's also key to note that a simplistic business solution is not likely to evolve with features that will grow with your business, while a complex consumer grade solution is not likely to match support and customization to match those features to organization-specific concerns.

Recommendations

Every business is comprised of a varying set of role groups, each with their own needs. In order to successfully adopt mass-market solutions to solve mobile users' issues, an understanding of the mobile worker population must be undertaken and their specific needs must be assessed before a solution can be chosen. The following steps define a mobile strategy plan:

- **Conduct an audit for level-set**: Before embarking on user identification and role analysis, the initial and most critical step is to perform a level-set. It's likely that most all workers inside an organization are toting mobile devices. The question becomes what are the devices and who is using them. Network analysis, looking at the basic numbers of devices associating to the WLAN and determining what the mix of devices is among the user population, is a great place to start this process. Device ownership can be established by cross-referencing this data (if user credentials are associated with each device's network presence) with procurement or expense records to determine the ownership of devices and who is paying for service. Conducting a survey of platform preference will uncover trends and shifts in device preference, as well as net a representative suite of favored tools among users if the sample size is big enough. This provides solid cluster analysis data to begin shortlisting potential tools by role group for later stages of rollout.
- **Understand user needs by conducting detailed stakeholder interviews and human factors analysis**: Cluster analysis completed in step 1 will shed some light on the tools that users favor; however, those tools may not be ideal choices for the long term. Instead, it's wise to use these choices (and they will vary by role group) to kick-start conversations with groups of stakeholders about not only what devices and apps are in use, but what specific business processes they're looking to conquer and what information and systems they must interact with along the way. Taking this a step further and doing human interaction testing — "riding along" with various groups of users as they work to complete tasks — will provide yet more data on this: for example, not only that a user wants access to sales presentations, but, perhaps, that connectivity will preclude the use of documents stored in the cloud. These factors, in addition to tool selection and information access needs, are critical to ensuring the success of a mobile initiative.
- **Choose the right solution by creating a weighted partner model**: Inputs form the previous two steps will help identify the platforms that demand support, as well as the groups most in need of mobility. In addition, the use-case modeling through stakeholder interviews will shed light on the problems that users are trying to solve, some of which will extend beyond having the right tool for a given task. These factors should inform the elements of a partner selection tool. An example set of inputs would be the discovery of a 550 Windows Phone 7 devices on a network, largely in use by field service people. These workers are looking to upload service inspection videos from the field, often in building basements with little connectivity, the latter discovered though a human interaction analysis. A simple set of evaluation criteria here would be a) the support of relative mobile newcomer Windows Phone 7, volume-based licensing that kicks in at or below 500 users, b) support for video uploading in high quality and c) the ability to securely store data locally when being used offline. Each criterion should have its own set of weightings depending on the importance of a given feature.

One size does not fit all. And while the analysis outline presented here is a much more involved effort than any mobile rollout of the past, we've illustrated that past rollouts account to limited support and users will adopt tools themselves if the IT organization does not begin to proactively serve their needs. Making an investment now with an informed set of solutions that cater to users' specific needs by role will provide ease of management, security, and cost planning in the future.

Ecosystem Input

This report includes input from market influencers, vendors, and end users who were interviewed or briefed by Altimeter Group during the course of this research. Input into this document does not represent a complete endorsement of the report by the individuals or companies listed below.

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Altimeter Group is a research-based advisory firm that helps companies and industries leverage disruption to their advantage.

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