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Voice Report



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Communications Technology Insight: Mobility Management in the Enterprise Environment

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**Industry Survey:
Mobility Management in the Enterprise Environment**

Introduction

In April 2011, *Voice Report*, a publication of CCMI, in conjunction with BizTechReports, an independent reporting agency that covers enterprise technology trends, surveyed 150 executives across dozens of industries regarding their adoption and utilization of Mobility Management (MM) solutions to administrate usage of mobile devices within their enterprises.

MM solutions allow organizations to manage the costs associated with their mobile users by providing unified visibility into the utilization of all mobile devices and services. More organizations are implementing MM technologies to help manage their mobile service expenses, streamline provisioning, and enhance security.

According to these survey findings:

- 56 percent of respondents reported that their organizations currently manage more than 500 devices, and almost one-third (32 percent) are managing more than 2,500 devices.
- 76 percent of respondents with MM solutions reported having them in place longer than one year.
- 38 percent of respondents indicated that their organizations plan to invest more in MM in 2011.
- Almost half (49 percent) of respondents cited expense management as a key MM driver, revealing that many organizations expect to garner cost savings after deploying MM tools and metrics to their enterprises.

MM Adoption Under Way

According to these survey findings, only one-third of respondents (33%) are currently using an enterprise-wide solution for mobility management (Fig. 1). Two-thirds of respondents say their organizations have no such solutions in place.

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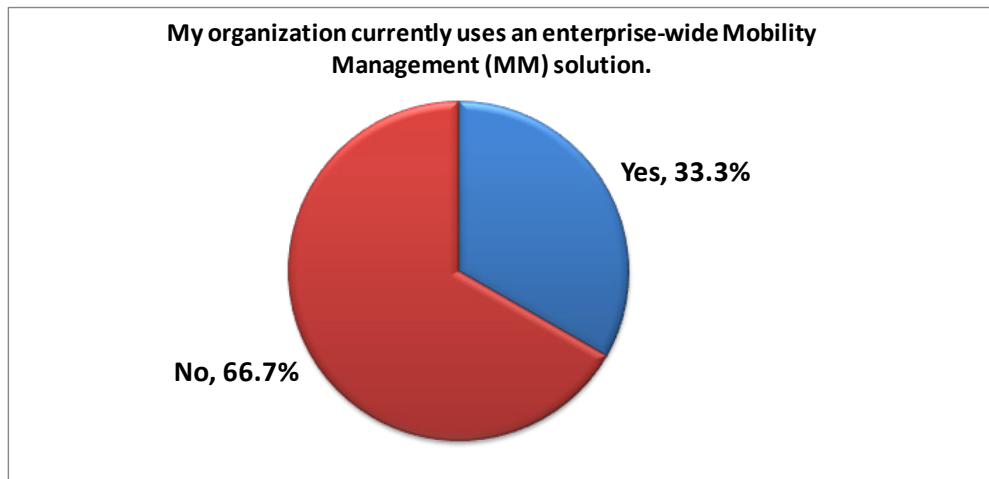


Figure 1

Of those not currently using a MM solution, 38 percent said they're waiting to see how MM solutions work for others and 37 percent reported concerns about the administration burdens of implementing such solutions (Fig. 2).

26 percent of non-users reported that they don't see the benefits of implementing MM, while 24 percent perceive that implementing an MM solution would prove too costly.

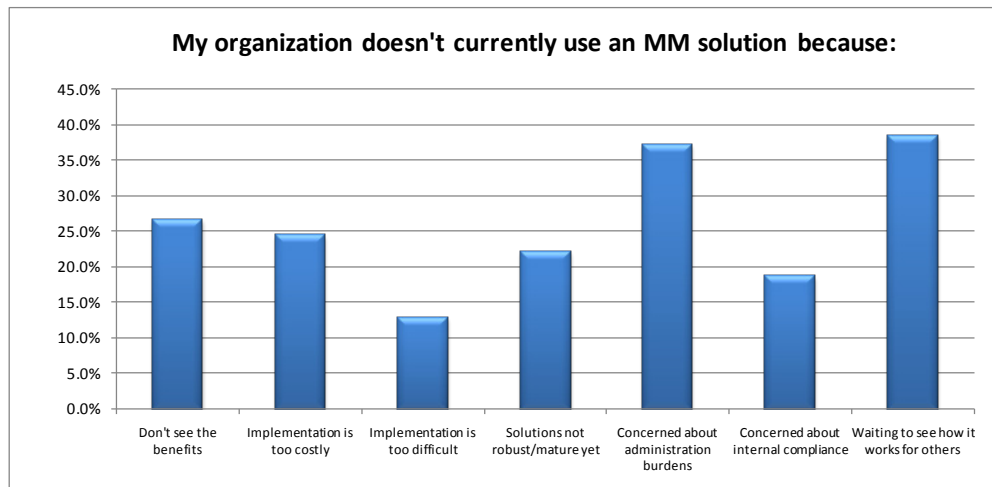


Figure 2

Additionally, 26 percent of non-users reported that they don't see the benefits of implementing MM, while 24 percent perceive that implementing an MM solution would prove too costly. Some 18 percent reported concerns about internal compliance within their enterprises, and 22 percent believe that MM solutions are not sufficiently robust or mature yet. Only 12 percent believe that implementing an MM solution would be too difficult for their organizations.

One of the key ingredients to establishing a successful governance and management structure to address the new complexities associated with today's mobile device and networking environment.

“Clearly one of the biggest changes we're seeing now is the move from corporate liable to individual liable, and it is important to understand how it changes the rules of the game.”

“You really have to sit down and think about who's going to get what device, how much are the organization is going to pay for it, and how things are going to be secured,” explains Michael F. Finneran, Principal, dBm Associates, and one of the respondents to our survey.

“Clearly one of the biggest changes we're seeing now is the move from corporate liable to individual liable, and it is important to understand how it changes the rules of the game. Interestingly, many of the decisions in this category are not necessarily made by IT. We've got to get the other people in the room including management and particularly human resources.”

Mobility Management Investment Plans

While two-thirds of respondents are not currently using enterprise-wide MM solutions, 38 percent indicated that their organizations plan to invest more in MM in 2011 (Fig. 3). This suggests that more organizations are exploring expansion or adoption of their MM capabilities this year. By comparison, only 33 percent of respondents reported spending more on MM implementation or operation during 2010 than they did in 2009.

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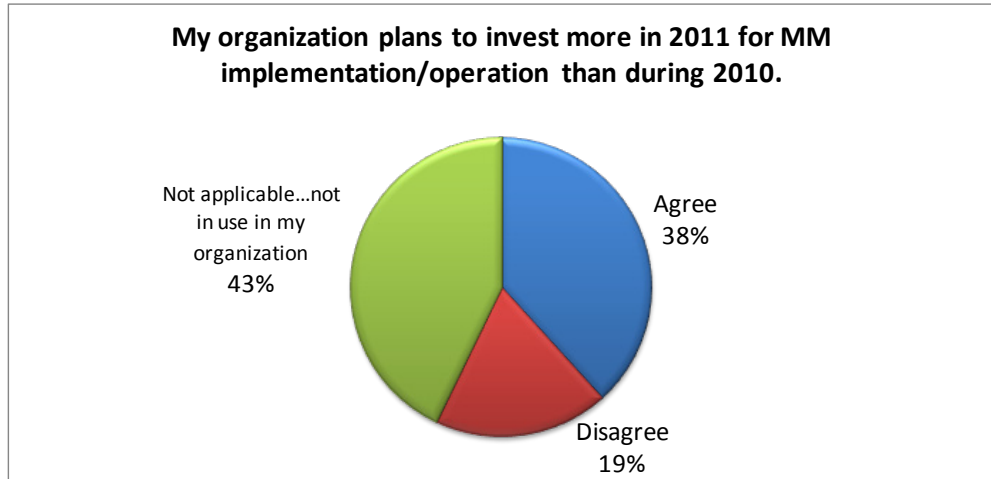


Figure 3

When asked about their objectives and motivations for deploying MM solutions, almost half of respondents (49 percent) revealed that expense management is the top goal for MM users (Fig. 4). According to 38 percent, improving mobile-device security is another important driver, and almost 30 percent cited better policy governance as a key motivation for deploying MM. Additionally, 25 percent said that making operational standards more consistent is a MM driver, while 23 percent cited faster provisioning of devices and services as their motivation.

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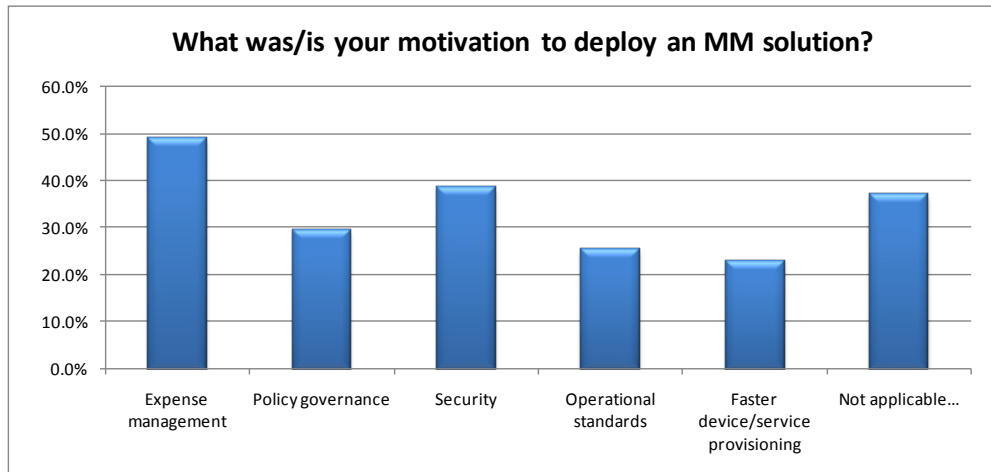


Figure 4

With expense management cited as a key MM driver by almost half of respondents, it's clear that many organizations expect to garner cost savings after deploying MM tools and metrics to their enterprises. Indeed, 30 percent of respondents – almost the entire segment currently using MM solutions – reported gaining some level of wireless cost savings since implementing MM (Fig. 5). Some 16 percent reported saving 10-29 percent over their previous wireless spend. Another 7 percent reported savings of 30-49 percent, while 6 percent cited savings of less than 10 percent over their previous wireless spend.

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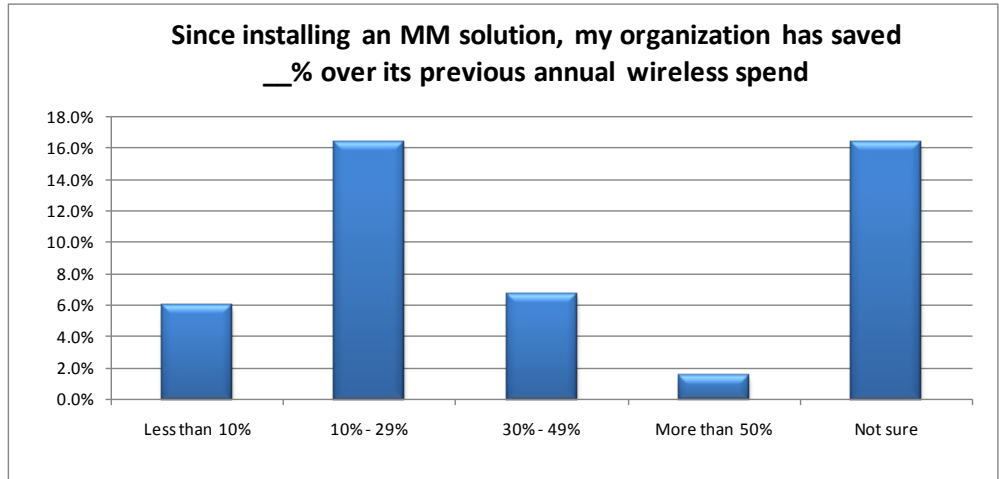


Figure 5

Mobile Environments Growing More Complex

When asked about the history of their organizations' mobility environments, more than three-quarters (76 percent) of respondents with MM solutions reported having them in place longer than one year, and 40 percent reported having their MM solutions longer than 3 years. This suggests a gap where a core segment of organizations have mature MM solutions in place, possibly giving them an operational advantage over the majority of respondents who do not have MM solutions at all. Only 24 percent of respondents with MM solutions report having deployed them within the past year.

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Figure 6

When asked about their MM enterprise platform models, more than one-quarter (26 percent) of respondents reported that their organizations operate their own in-house MM systems (Fig. 7). Some 13 percent said they procured their current MM platform on a Business Process Outsourcing (BPO) model, while Software as a Service (SaaS) MM solutions and MM software licenses are each currently used by 10 percent of respondents.

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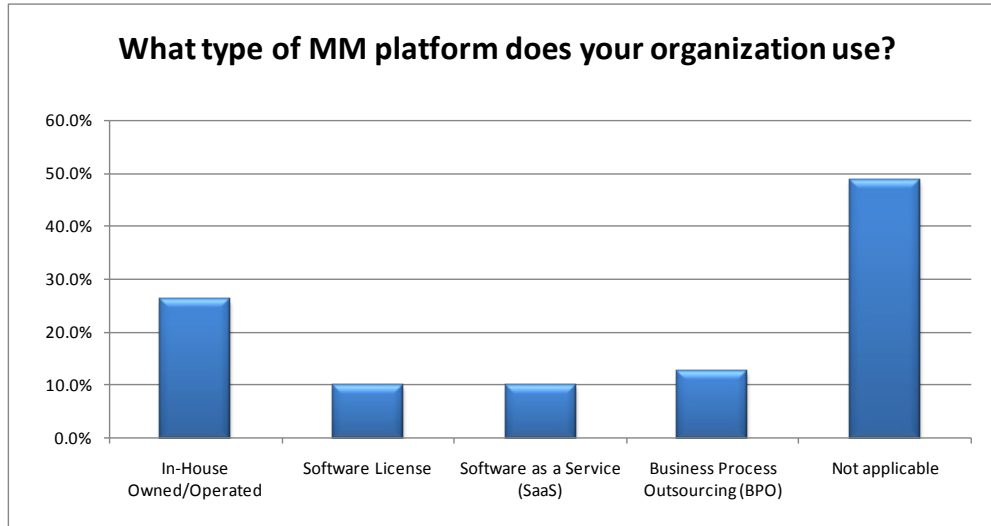


Figure 7

Demand for such MM solutions is driven by organizations becoming responsible for growing numbers of mobile devices. A majority of respondents (56 percent) reported that their organizations currently manage more than 500 devices, and almost one-third (32 percent) are managing more than 2,500 devices (Fig. 8). Some 15 percent reported managing very large mobile footprints of more than 10,000 devices.

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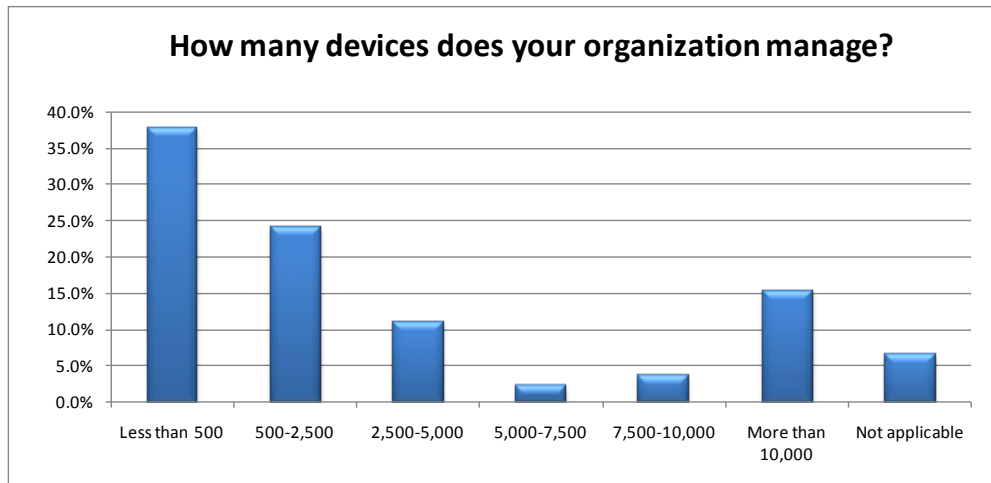


Figure 8

When asked about their organizations' mobile device policies, 44 percent of respondents indicated that their organizations manage only corporate-liable devices (Fig. 9). More than one-third (35.5 percent), however, reported that their organizations currently manage a combination of corporate-liable and individually-liable devices. Almost 7 percent reported managing mobile environments that are fully individually-liable, and some 14.5 percent indicated that their organizations have no stated policy in place at the moment.

"We have developed a true hybrid model from doing the internal provisioning as part of our IT function for corporate responsible devices, and then we do expense-back for individually-owned devices," says Stephen Jones, Global Telecommunications Manager for ACCO Brands of Lincolnshire, IL.

“We have people that connect up with their own devices that don’t request expensing and we also stipend to others. So for us it has been kind of a hodge-podge depending on the division that has been involved.”

“Within the last six months we have taken a very hard line look at what our costs really are in the support of the mobile spectrum. And it’s something we continue to visit almost on a daily basis. And that’s why we’ve had to step back, re-look at our policies, with regard to entitlements and everything like that. It’s been a challenge,” says Jones.

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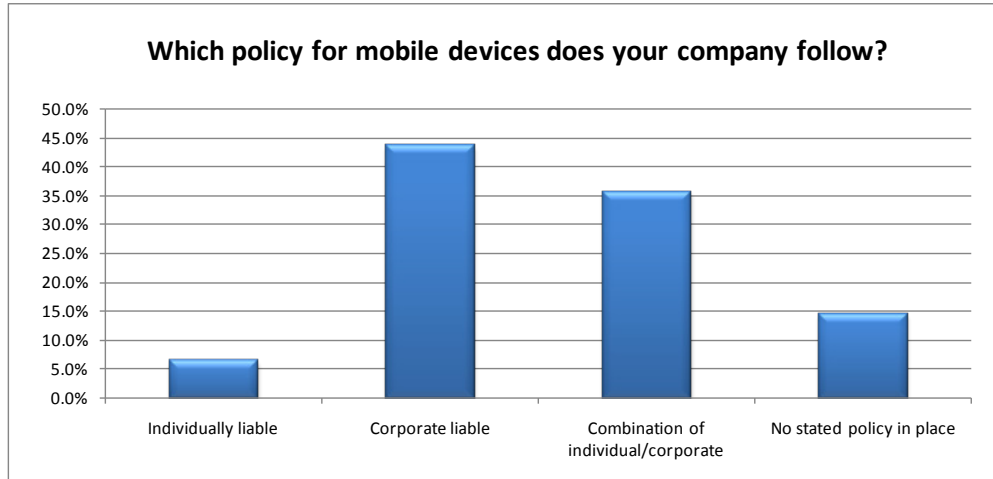


Figure 9

When asked about the functionality of their MM solutions, 35 percent of respondents with solutions in place indicated that inventory is the most commonly supported function (Fig. 10). Billing optimization was supported by 34 percent, while provisioning/order entry as well as invoice/payment processing are each supported by 30 percent of respondents’ MM solutions. Multi-provider management is supported by 29 percent, while audit functions are supported by 28 percent. Only 23 percent are currently supporting contract compliance as part of their MM solutions.

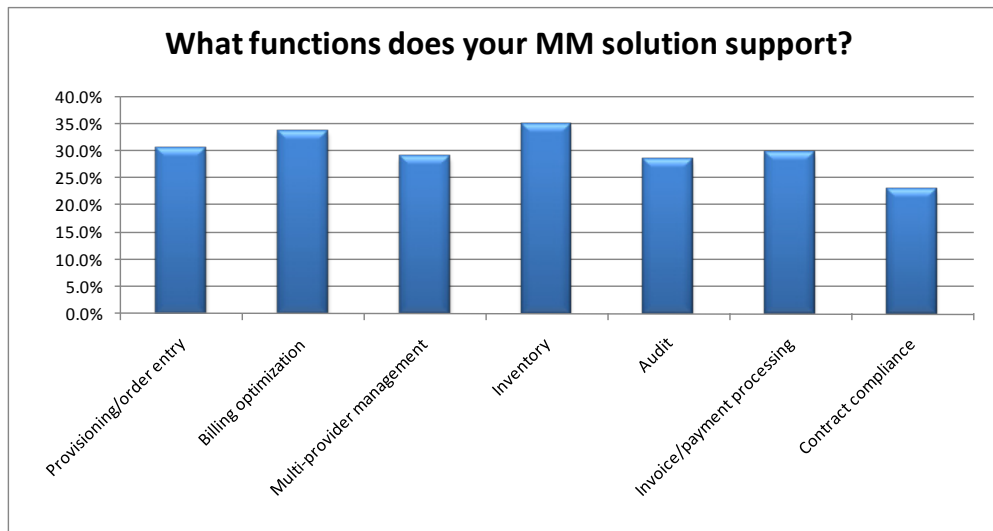


Figure 10

A majority of respondents cited multiple benefits that MM solutions offer over their

legacy management practices (Fig. 11), such as centralized management (73 percent), more efficient administration (65 percent), reduced expenses (62 percent), and policy enforcement (52 percent). Additional benefits noted by respondents include custom reporting (50 percent), invoice auditing (47 percent), greater security (42 percent), and simplified contract negotiations (31 percent).

“If we let somebody have remote access to our systems and they can get to the records it’s very hard for us to prevent them from finding ways of storing and using the data, despite any policy or agreement preventing or forbidding it.”

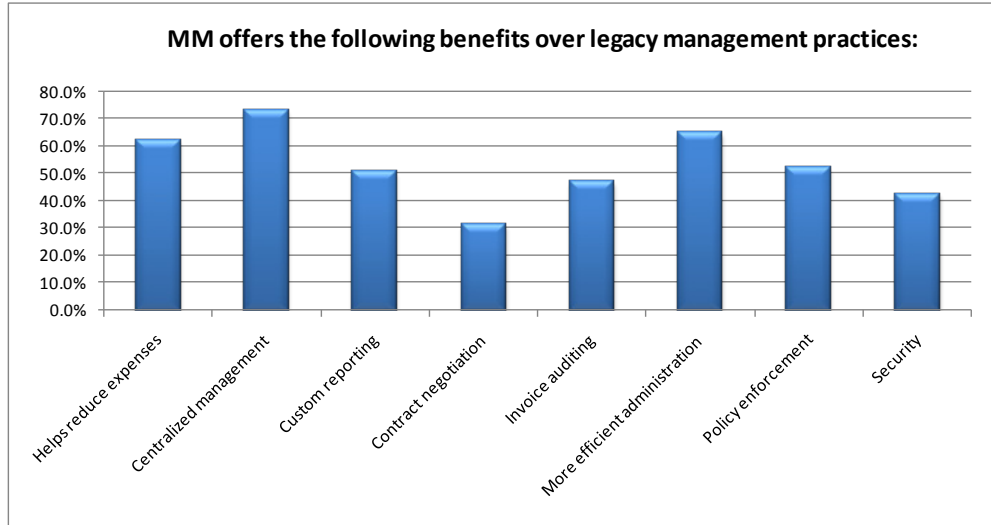


Figure 11

Managing the security and support issues of today’s much more complex mobility environment is an issue that many organizations are wrestling with.

“If it was just managing cell phones it would be a two-minute conversation and we’d be off on our way,” says Joseph Dechow, Manager, Information Systems, Munson Medical Center in Traverse City, MI.

“The other problem of course is the vast majority of these things are personally owned. The hospital owned devices are really quite easy to take care of and we manage them through policy. We can certainly chop something off the network and we do tracings and things like that watching for malicious stuff. The stuff that’s ours and on our network is really not too bad to deal with.

“What is more problematic is the stuff that people own personally. If we let somebody have remote access to our systems and they can get to the records it’s very hard for us to prevent them from finding ways of storing and using the data, despite any policy or agreement preventing or forbidding it. We really don’t want them to do that, but we have a lot of care-givers that need this data or access to this data to take care of people,” says Dechow.

It is a dilemma that is not unique to Munson.

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