synchronoss
ENTERPRISE

THE STATE OF ENTERPRISE MOBILITY

Findings from the 2017 Synchronoss Research Survey

WHITE PAPER

Executive Summary

Is investing in enterprise mobility worthwhile? And are the benefits of advanced mobility worth the additional investment?

The first question would almost always be answered by IT and business leaders with a "yes". The second one may be more divisive. Logic would dictate that greater investment means greater and more numerous benefits. But there is a lack of clarity as to exactly what can be expected and what the financial impact would be — causing inertia.

This report from Synchronoss Enterprise seeks to discover two things:

1. How mature are US and UK enterprises in their adoption of enterprise mobility?
2. Have those who have invested more seen greater benefits, and if so, what sort?

Synchronoss Enterprise devised a mobility maturity model for enterprises, consisting of four categories sub-split into eight stages, based on their capabilities in Productivity, Contextuality (use of mobility data) and Security.

The results showed a surprising lack of progress. More than a third of the 500+ enterprises examined still occupy the first stage of the model, named "Entry Level". This is characterised by devices providing only basic tools (email, calendar etc), not collecting any data on device usage and having no firm requirement for device security. The fact that so many enterprises still – despite the threat landscape – do not require security and leave it to employees' own discretion was simply stunning.

43% were classified as "Opportunistic", the next stage in mobility maturity. This encompasses those using some dedicated file-sharing tools, collecting and analysing limited device usage data and those who required the use of PINs and passwords for security. A fifth (19%) occupied "Additive" due to their integration of apps, including proprietary ones, their creative use of mobility data e.g. location data and app usage in order to make improvements to business processes, and their use of multi-factor authentication.

Some enterprises qualified for one of the requisite facets for "Transformational", but none could do all three. 9% qualified on the basis of Productivity (able to securely share information with external third parties), but none had reached this stage for security (able to use mobile devices as an authorisation factor for accessing other assets or data) nor for contextuality (able to analyse mobility data alongside IoT or line of business data).

For an industry first, Synchronoss Enterprise then analyzed the types and degree of benefit delivered by maturity progression.

Enterprises' productivity increases with mobility maturity. There was a 15% difference in productivity between those at Entry Level and those who had reached the Additive category – the highest category reached by any of the enterprise respondents.

There is also a clear correlation between profitability and mobility maturity. Progressing along the first three stages of mobility triggered 9% and 11% jumps in profitability, highlighting the commercial impact of a more productive workforce.

In addition, year on year profit growth also increased in parallel with mobility maturity. A 49% difference in profit growth was identified between enterprises in the Entry Level category and those in Additive.

The internal reputation and perception of both the IT team and CIO grows with mobility maturity. There was approximately a 10% difference in internal positive perceptions between the two ends of the maturity model.

Users are surprisingly more comfortable with more advanced mobility tools. The number of helpdesk calls received by enterprise IT support teams generally rose with each maturity stage as more complex technology is introduced. But the demand for support dropped dramatically once Additive (the third category of the four) was reached. Between Entry Level and Additive, there was a 14% drop in average helpdesk calls, despite the greater complexity of the tools and technology in users' hands.

The 'Three Pillars' of Modern Enterprise Mobility and How They Impact Maturity

To the outsider, enterprise mobility seems to be one of the easiest objectives for an IT team. Provide or equip devices with access to the network and suitable tools, and individual productivity increases. Simple.

But productivity is nothing if it is not secure. Especially given the modern threat landscape and 2016 being littered with reports of high profile breaches, cyber attacks and misplaced data. And then what about the data that employees generate simply from using the device? Insights born from how, where and when individuals use their devices are extremely powerful for making efficiency decisions – and such context can even be used to support security.

Synchronoss therefore considers mobility in enterprise maturity to be comprised of three pillars: Productivity, Security and Contextuality.

Productivity

Greater productivity is the key objective of mobility. The most basic endeavours will hinge on the provision of simple mobility productivity (i.e. remote email, calendar and other PIM tools). More advanced enterprises will integrate custom apps with others and enable employees to share information beyond simple email processes both within the business, amongst teams and even outside the business.

Security

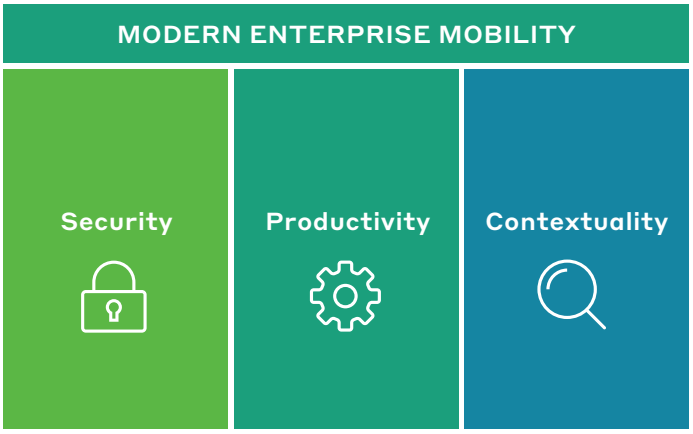
Security is essential – of the device, apps or containers and even of data at rest or in transit. The spectrum ranges from no device protection, through reliance on native OS functionality, all the way to various levels of on-device, multi-factor authentication combined with encryption of data in transit. The pinnacle is securing devices to such a high level that they become "factors" for authentication to external assets or data sources.

Contextuality

Basic enterprise mobility offers little or no visibility into how mobile devices are being used and therefore how employees are benefiting, or could benefit further. This requires more than Telecoms Expense Management (TEM) data – which is where many enterprises believe mobility data interrogation begins and ends. Instead, detailed information on where and when devices are used, which apps are most popular or useful and how data is shared is needed. The most advanced will integrate mobility data with other datasets, such as from IoT sensors or lines of business. Gathering this contextual data allows analysis against departmental KPIs with a view to improving processes and even tools.

These three pillars all inter-relate. Device and data security underpins the use of mobile devices to improve productivity. Meanwhile, greater productivity causes more contextual data to be created, which is in turn used to improve performance against KPIs, and can also be used as an additional asset in security.

But is more advanced enterprise mobility worth it? What impact does it have on the business? Boards have for many years agreed that enterprise mobility is a necessity, but have rarely – if ever – taken the time to understand its actual value to the business. Nor what value could be gleaned from greater, wider, more advanced mobility. For the first time, this report shows precisely what benefits can be seen from progressing through the stages in enterprise mobility maturity.



Mobility Maturity & Impacts

The Mobility Maturity Model

To help organisations better understand and plan for their own enterprise mobility journey, Synchronoss has developed a maturity model, split into eight distinct stages, covering all three pillars of enterprise mobility. For ease, the stages are then grouped into four categories.

CATEGORIES	STAGES	PRODUCTIVITY	CONTEXTUALITY	SECURITY
ENTRY LEVEL	A	Limited to remote email, calendar and other PIM tools	Zero visibility of how mobile devices are being used	No device security required
OPPORTUNISITIC	B	Secure information-sharing (beyond email) within a defined group in the business	Data on usage of apps is gathered, but analysis is rare	Reliance on native OS security e.g. password / PIN / biometric on device
	C	Workflow functionality such as approval requests, access management and comments	Reporting is now regular, but limited to basic analysis such as TEM. Creation of reports is manual and limited in scope	Native OS security plus username and passwords on selected apps / containers
ADDITIVE	D	Integration of PIM apps with each other and with other standard apps e.g. cameras	Collection of more varied data, e.g. location, proximity of other devices etc. Regular, semi-automated reporting and analysis leads to improvements to operations	Multi-factor authentication on device, plus username and password on selected apps / containers Specialised security of data when in transmission
	E	Integration of PIM apps with the enterprise's own proprietary apps	Dynamic and responsive reporting, applied to departmental KPIs and impacts measured	All data is encrypted with enterprise-defined keys when in transmission
	F	Secure information-sharing (beyond email) amongst various groups within the business	Analysis is automated and actions are either recommended or executed automatically	Geo-based encryption and decryption of information in transit
TRANSFORMATIONAL	G	Information shared externally (beyond email) with partners, suppliers, customers etc	Data gathered and analysed includes other data sources e.g. sensors or LoB datasets	Device security sufficiently robust for device to be used as a "factor" for authentication to external assets or data sources
	H	Gig economy workers accommodated and measured equally to full-time workers without compromising security		

The 2017 Mobility Maturity Landscape

In January 2017, and using the maturity model above, Synchronoss commissioned Sapio Research to conduct an independent analysis of the degree and impact of enterprise mobility maturity across 500+ enterprises in the US and UK.

Qualification for the individual stages was based on passing the requirements for all three facets of mobility. Any anomalies caused by enterprises qualifying for only two of three of a stage's requirements were mitigated by grouping the eight stages into four categories.

Further detail of the methodology is available at the end of this report.

Despite mobility being a key discussion in enterprise IT for decades, the spread shows enterprises to be largely languishing still in the very early stages of maturity. The highest proportion remain in the lowest stage, offering only simple tools, not requiring device security and with no visibility of device usage.

38%

The proportion of US & UK enterprises that are still only in "Entry Level" category of mobility maturity

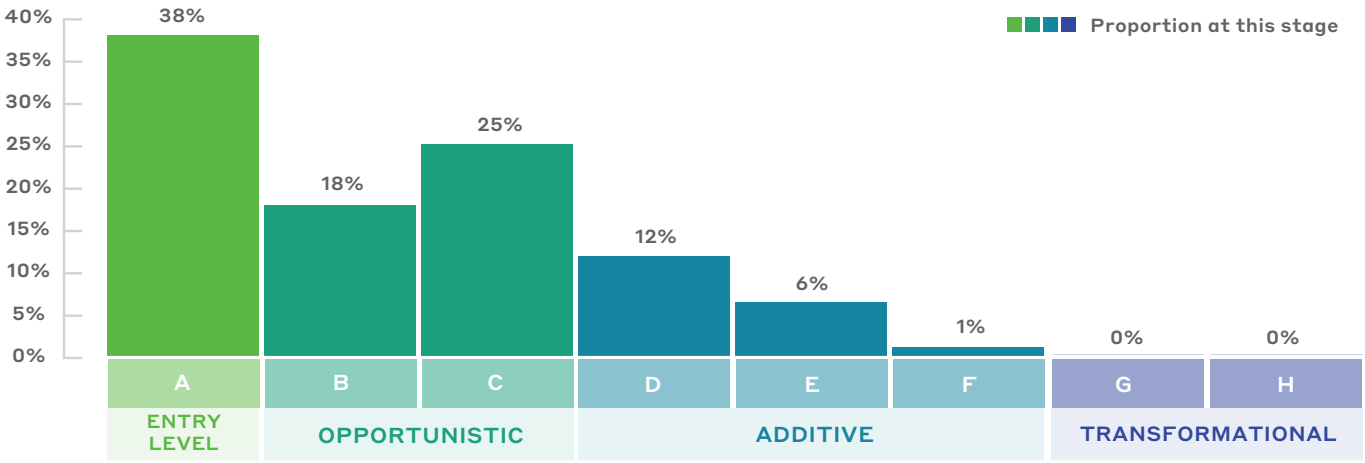
Progression into "Opportunistic" levels (stages B & C) where information sharing is through dedicated tools and not reliant on email appears quick – 43% of respondent companies occupy this category. In fact, once the basic step into Stage B is taken (use of file-sharing tools and occasional analysis of app usage data), most shoot straight through into Stage C which requires the addition of workflow and approval functionality, more frequent reporting and additional security measures. It seems that once the mindset switch of improving mobility is achieved, progress is rapid.

0%

The proportion that have progressed to "Transformational"

But progress beyond this point then stalls – only 19% have reached "Additive" by integrating apps together and analysing data on their usage to identify areas of business improvement, and also using multi-factor authentication. And no enterprises have advanced sufficiently in all three areas simultaneously to qualify as "Transformational" in their mobility maturity.

So what? Why is it important for an enterprise to have made these leaps? What benefits are there to investing further in mobility?



The Impacts of More Mature Mobility

Alongside measuring where enterprises ranked, the study also investigated the performance of the businesses in each stage, plus the performance and internal reputation of the IT team. The results showed clear trends in productivity, profitability, profitability growth, internal CIO reputations and user satisfaction.

IMPACT ON PRODUCTIVITY

Improving productivity is a constant discussion in the business world. It is a standard metric of business success that the more productive an individual, team or organisation is, the more profitable they become. Less time; more output. Contributory factors range from the tools they use, business processes and even employee happiness and motivation. But how does mobility factor into productivity? Does it make a difference?

15%

The productivity difference between workforces at Entry Level and those in the middle of Additive

The study found that perhaps unsurprisingly, as mobility maturity improved, so did the respondents' perception of the business' productivity (rated on a 1-7 scale). Mobility is, after all, primarily intended to make information accessible more widely and increase engagement.

The two greatest jumps in productivity were seen from Entry Level to Opportunistic (7%), and also at precisely the switch from Opportunistic to Additive (5%).

The correlation is clear: the more mature the enterprise is in its mobility, then the greater its productivity.

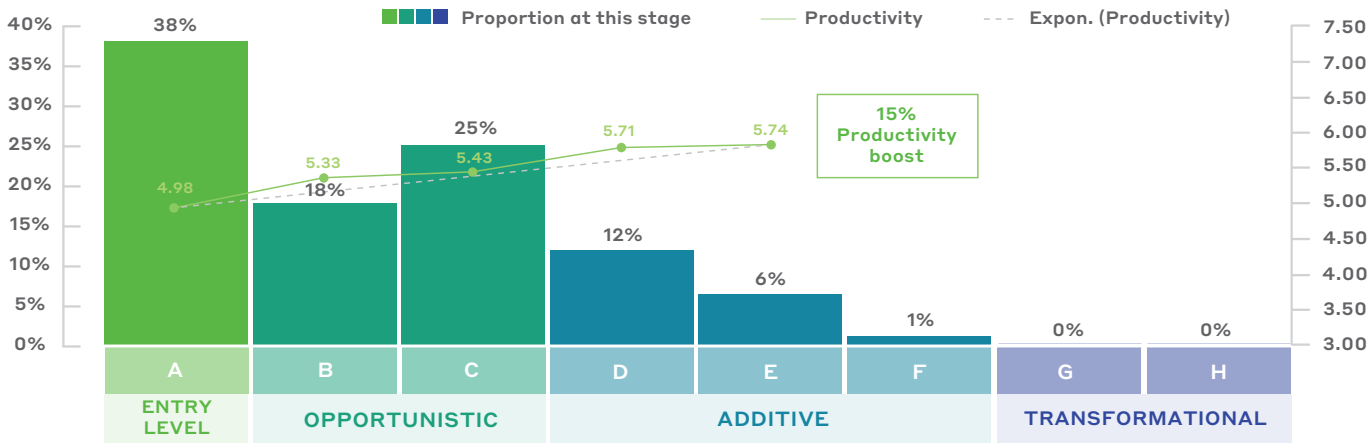
7%

The increase in productivity that can be expected simply from the single step of moving from Entry Level to Opportunistic

And while no enterprises qualified for all three mobility facets of the Transformative category of the maturity model, productivity was the only one where any enterprises had qualified (9%). A clear sign of the importance that enterprises are placing on productivity when considering how to best develop their mobility capabilities.

5%

The productivity boost that comes from integrating apps, collecting device data and multi-factor authentication



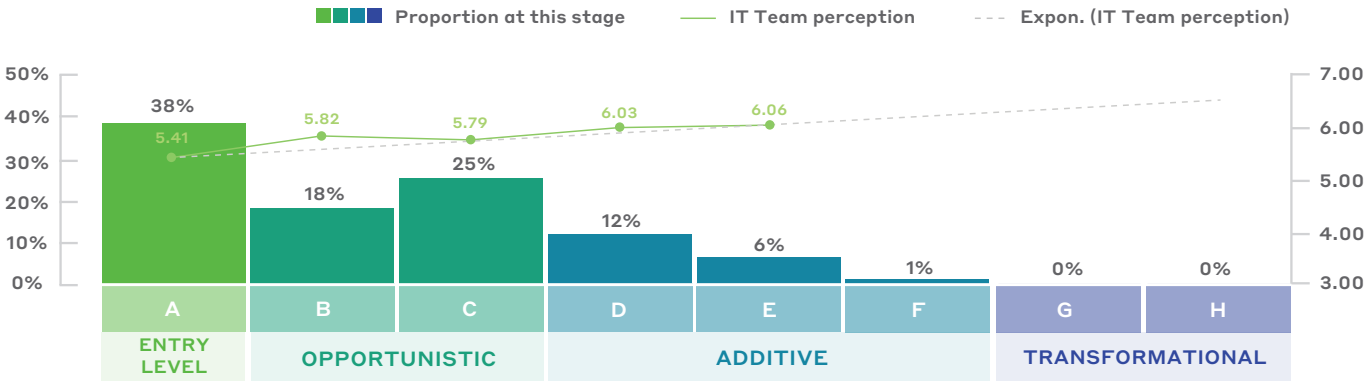
IMPACT ON INTERNAL PERCEPTION OF IT TEAM AND CIO

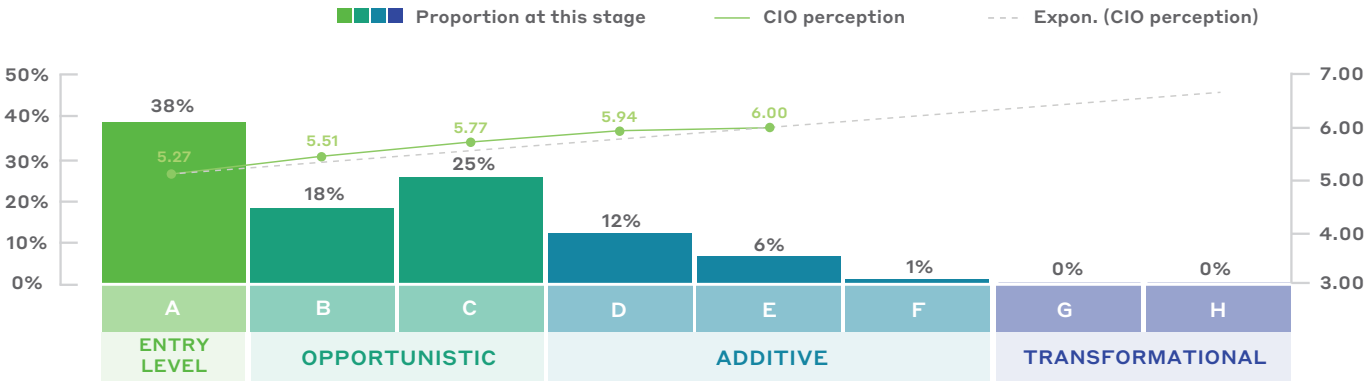
An IT team or CIO are naturally judged on the success and impact of the projects they deliver. And so, as productivity has already been shown to increase in line with maturity, the internal perception of both CIOs and their teams increases.

Perception was measured on a 1-7 scale, with 1 representing "poor" and 7 being "excellent". The data showed a 12% uplift in perception between those IT teams in enterprises where mobility was lowest – Entry Level – and highest (Additive), and a trend for even greater perception in the last stage, Transformational. For CIOs, the difference was even greater: 14%.

Simply put, by driving greater mobility maturity, CIOs and IT teams are able to take direct credit for the tangible commercial impacts of increased business productivity, and the likelihood of security and compliance breaches decreasing.

"By driving greater mobility maturity, CIOs and IT teams are able to take direct credit for the tangible, commercial impacts of increased business productivity."





IMPACT ON USER SATISFACTION

User satisfaction was measured by the average number of helpdesk calls that the enterprises' IT teams within each maturity stage received each month that were specifically related to mobility, e.g. device malfunctions, app issues, or lost and forgotten device passwords. The fewer inbound calls, the higher the levels of satisfaction.

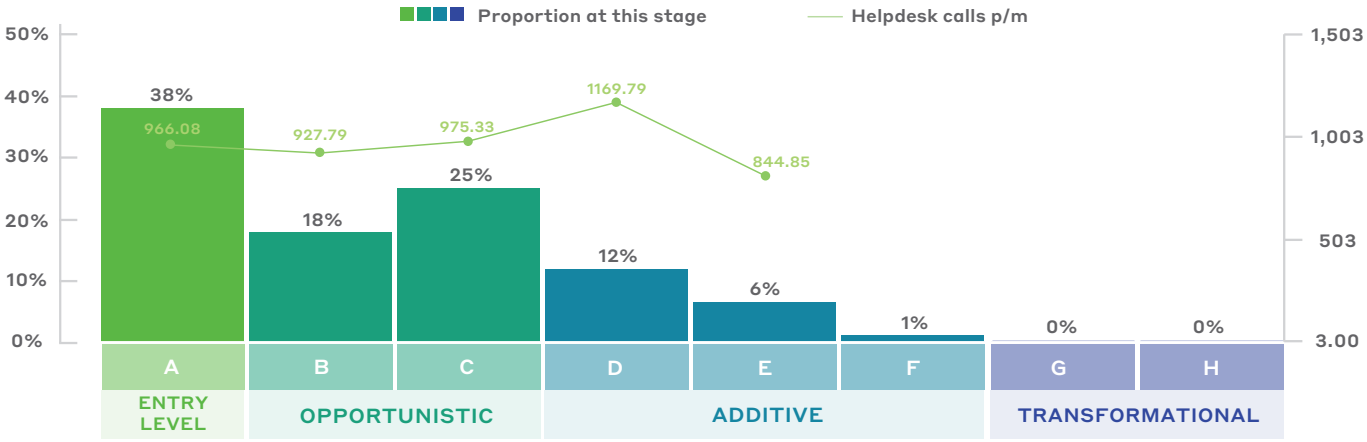
The trend here was surprising. As sophistication grows from Entry Level to Opportunistic, the number of helpdesk calls stays roughly static. It would be expected that greater complexity would lead to more support requirement. But perhaps given the limited degree of difference between the two phases, and the likelihood that the tools involved are also part of the desktop way of working, it is understandable.

However, the initial step into Additive mobility creates difficulties for some enterprises. The introduction of app integration and multi-factor authentication triggers a dramatic increase in user support demand. Greater complexity and additional security procedures that many employees may not have previously been familiar with appears to wrongfoot some employees and so need to be handled carefully.

Although once this step is taken and passed, the demand drops off sharply – even to levels lower than the earliest stages of maturity – as users become more used to the technology and functionality and are able to self-serve. Contrary to initial expectation, the more advanced the mobility, the less technical support required – a clear indication of user satisfaction.

14%

The degree to which mobility-related IT helpdesk calls can be expected to drop from Entry Level maturity to Additive



IMPACT ON PROFITABILITY AND PROFITABILITY GROWTH

So far, the study has proven that mobility maturity results in increased productivity, without risking the satisfaction of the user and workforce, and improves the internal perception of the IT team and CIO.

But does it impact the enterprise's core objective of profitability, and year on year improvements in profitability?

9% and 11%

The stage-by-stage profitability improvement as an enterprise moves from maturity stage A to B and from B to C

By analysing both the current and annual improvement in profitability for each of the respondents classified in the various maturity stages, two clear trends were obvious.

As maturity increases, profitability grows with it. This is due to the growth in productivity, wide use of insights gleaned from contextual data, and without the brand damage of security breaches.

The most impactful steps to take in terms of profitability improvement are once again in the early stages, from Entry Level to Opportunistic, and from stages B to C – the two maturity stages within the Opportunistic category. This highlights the commercial benefit of even slightly more advanced maturity. Just the introduction of file-sharing and basic data analysis has massive commercial impact. And while the degree of improvement levels off as maturity grows, it still increases.

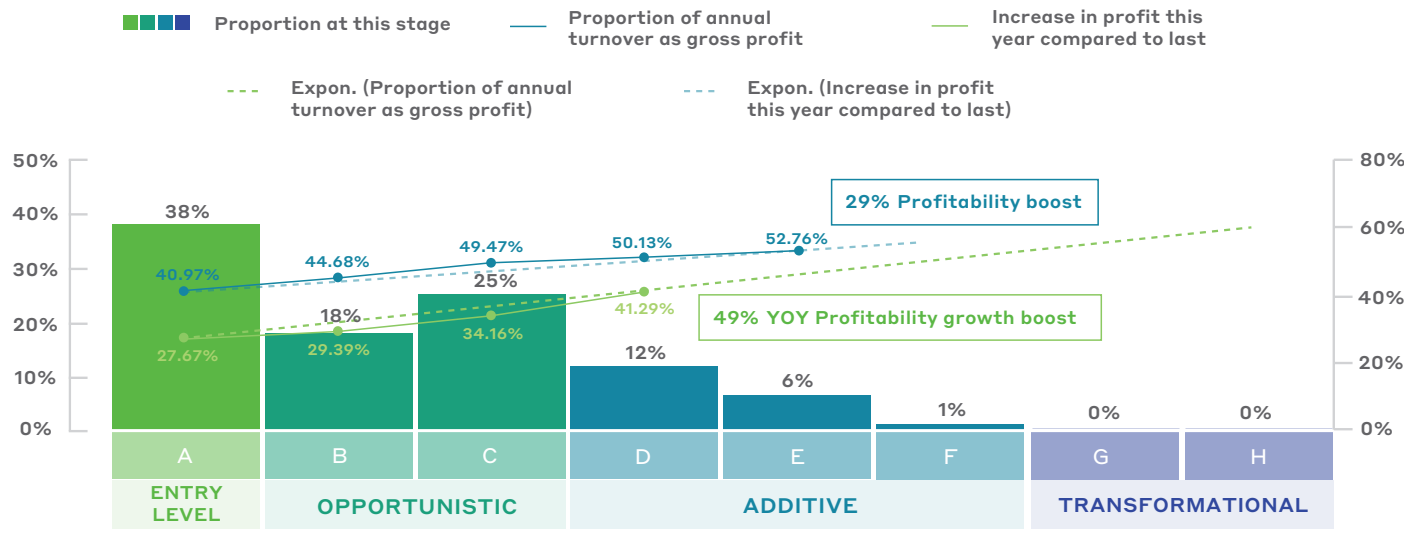
29%

The difference in profitability between those at the bottom of the maturity scale and those at the top

However, the relationship between mobility maturity and continued profitability is even more dramatic. Year on year profit growth is greater the further up the maturity scale an enterprise progresses – exponentially so. This is because as mobility is invested in further, more and more benefits are realised – greater individual and team productivity; more rigorous data analysis and focus on departmental improvements; more care taken over security. These new benefits in turn lead to greater and greater profitability.

49%

The difference in percentage increase in profit this year versus last between Stage A (Entry Level) and Stage D (first stage of Additive)



Mobility Maturity & Impacts

The case for advanced enterprise mobility is clear. Progress through the stages of maturity results in direct benefits to the CIO and IT team (improved internal perceptions), the workforce (user satisfaction) and the wider business (productivity, profitability and profitability growth).

The logic underneath these conclusions is simple, and it stems from the inter-relations between the three pillars of enterprise mobility: Productivity, Contextuality and Security.

The further along the maturity model an enterprise progresses, then the more productive it is bound to be. But productivity does not come from the availability of mobile tools alone. It also comes from being able to make deliberate, focused changes to the business' operations – changes which come from the use of contextual data. That data can also be used to improve security by turning device usage context into a verification factor. And the higher the security, then the more capabilities that can be confidently permitted on mobile devices, in turn improving productivity.

And the link between productivity and profitability is well known.

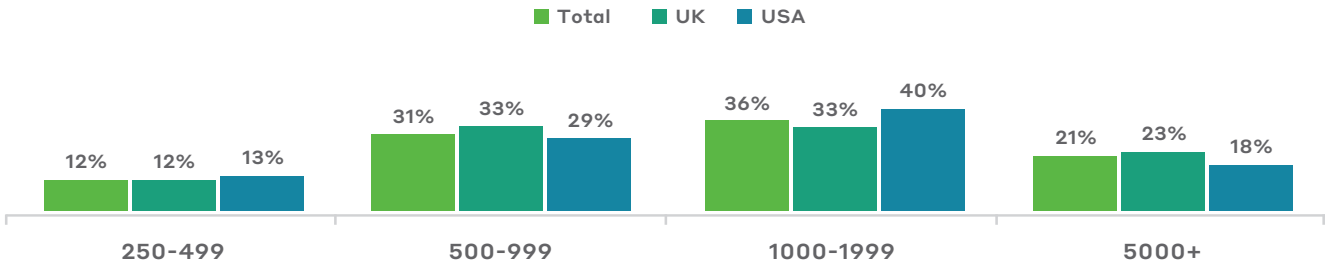
It has always been assumed that enterprise mobility was worthwhile, advantageous and impactful. But it was never understood beyond anecdotal evidence or improvements identified in discrete workflows or departments. Now the enterprise-wide, and even personal, benefits are clear.

What enterprise can afford to ignore a potential 9% or 11% boost to profitability, simply from making mobility more advanced? And what CIO would not want to further his or her internal reputation?

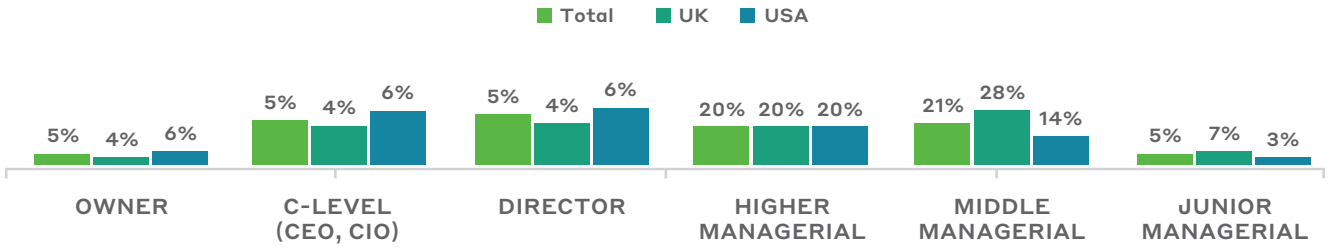
Methodology

In January 2017, Synchronoss commissioned Sapio Research to conduct an independent analysis of degree and impact of enterprise mobility maturity across 500+ enterprises (company size breakdown is below), with an approximately even split (51:49) between US and UK. Respondents had to have material control or influence over device policy, app usage, device usage or security in order to be included.

COMPANY SIZE BREAKDOWN



JOB TITLE BREAKDOWN



Synchronoss (NASDAQ: SNCR) is the leader in mobile cloud innovation, delivering security, mobility, identity, and analytic solutions for enterprises, mobile carriers, and retailers around the globe. Synchronoss enterprise solutions enable employee productivity without compromising security, allowing enterprises to realize the true power of mobility.

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