

Latest Enterprise Mobility Survey: Sometimes Less Control Means More Productivity



by Chris Marsh, Senior Analyst, cmarsh@yankeegroup.com

The Bottom Line

Faced with consumerization in the enterprise, employers' first impulse is to single-mindedly seek control. But instead, they should look to balance and share responsibility for device and application usage with employees. Our survey results show such flexibility not only brings better control but can also produce a substantial uplift in productivity.

Enterprise Mobility Is an Increasingly Complex Balancing Act

Now that enterprise mobility strategies have moved well beyond provisioning senior executives with BlackBerrys, enterprises are finding it more difficult to balance employees' increasing expectations of flexible and mobile work conditions with the imperative to ensure a productive and cost-efficient work force. Although productivity can be hard to come by in both mobile and non-mobile environments, results from Yankee Group's [Anywhere Enterprise: 2010 U.S. Enterprise Mobility/Empowered Employee Survey, Wave 1-2](#) reveal the right mobile technologies provided to the right employee segments can produce a substantial uplift in productivity. Ensuring the provisioning and management of mobile technologies is holistic, realistic and flexible enables employers to keep pace with the enterprise and consumer trends increasingly driving worker behaviors.

Methodology

This report is based on findings from Yankee Group's [Anywhere Enterprise: 2010 U.S. Enterprise Mobility/Empowered Employee Survey, Wave 1-2](#), an online survey conducted each quarter on U.S. employees' work behaviors, productivity and attitudes toward enterprise mobility. The latest findings from the first half of 2010 detail responses from 2,438 employees across small, medium and large enterprises.

Location, Location, Location

Employees spend more time away from their primary office than you might think. While heavy business travel is restricted to a minority of employees (only 11 percent spend more than 20 percent of their work week traveling for business), employees have a host of other reasons to spend time away from their office and colleagues. On average, 21 percent of employees' work week is spent away from their primary work location (not including the daily commute), and that number rises to 37 percent for executives. Whether taking a business trip, using public Wi-Fi in Internet cafes and libraries or working remotely from home, employees are spending an increasing amount of time working in mobile and indeed multiple locations.

To understand where the biggest dead zones are when it comes to getting work done, our survey asks employees to self-assess their productivity when working in different locations. The findings are not very surprising in that respondents feel mobile environments strongly erode productivity. Interestingly, however, productive work in the office is not so easy to come by either.

While most employees still consider the business office the best place to really knuckle down, 31 percent claim they are either unproductive or have low productivity there. At home is worse, however, with 63 percent struggling to really work there effectively. Even more (76 percent) find it difficult to work in customers' offices. So while worker productivity is all about location, productive work can be hard to come by no matter where you are.

Time To Think More Expansively About Provisioning Mobility Solutions

Given these mobile productivity challenges, clearly it is becoming increasingly important for employers to provide their work force with the right technologies when mobile. According to our survey, laptops are the most widely provided mobility tool, but only 28 percent of employees have one provided to them by their employer. Similarly, mobile phones, smartphones, PDAs, netbooks and tablets are reserved for only a small minority of the work force (see Exhibit 1).

The Right People

Our survey underscores the need for wider mobility initiatives. Employers need to look beyond the obvious executive candidates and expand their mobility initiatives to fully remote or mobile on-the-road workers. Although connectivity is particularly important for top executives, it is also important to middle managers, who spend 25 percent of their time away from their

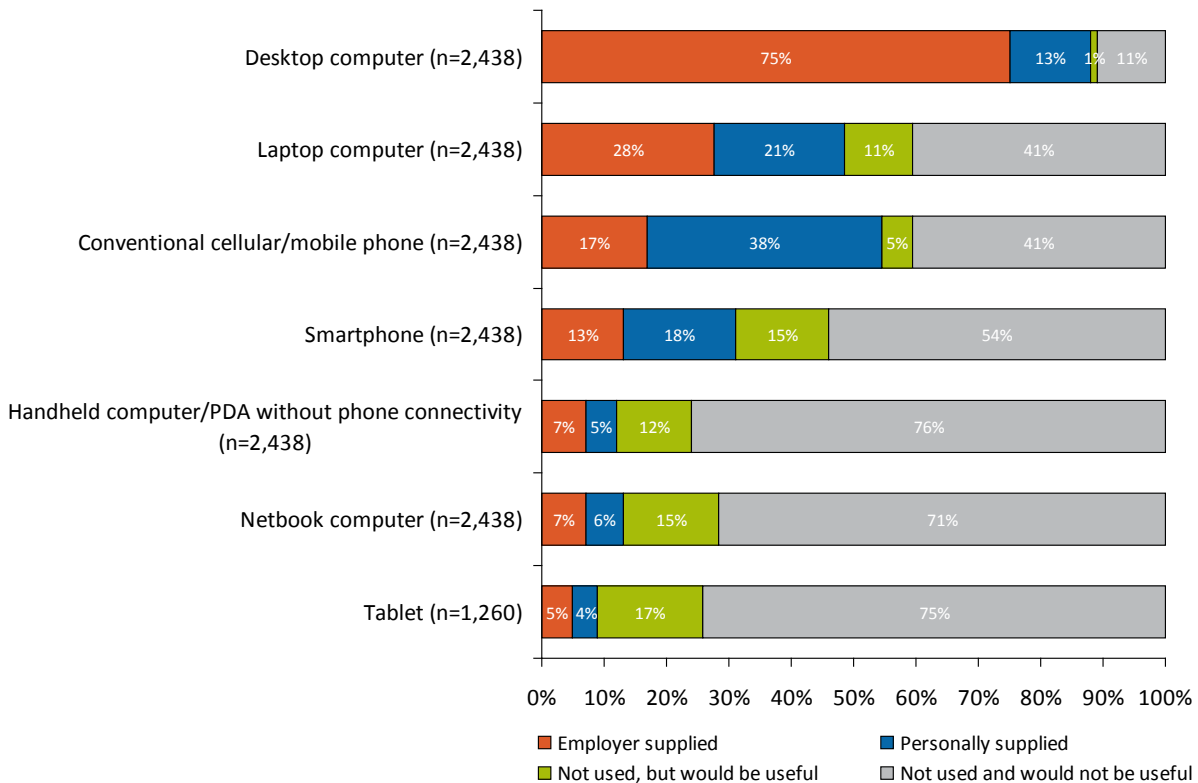
primary workspace, and staffers, who spend 16 percent of their time away. And these figures are only likely to increase, further underscoring the need for employers to widen their mobility scope.

Since middle managers currently spend 25 percent of their time away from their primary workspace, they are on the cusp of the threshold beyond which mobile technologies become less of a nice-to-have and more of a necessity. Indeed, an increasing proportion of middle managers say they believe new mobile devices would be useful for work. For this segment, smartphones are the most popular (with 45 percent already owning one, and another 15 percent saying they would be useful), but netbooks (19 percent already owning) and tablets (19 percent showing interest) are also prominent.

Some specific middle management segments pose stronger requirements for connectivity in general, including sales and business development and professional services. Customer service middle management tends to gravitate toward handheld computer/PDA devices and smartphones. Educators also show great interest in mobile technologies across the board.

Exhibit 1: Few Employers Supply Mobility Tools to Their Employees

Source: Yankee Group's Anywhere Enterprise: 2010 U.S. Enterprise Mobility/Empowered Employee Survey, Wave 1-2



The Right Devices

Our survey also shows there is strong employee interest in using a number of mobile devices for work purposes. For both tablets and netbooks, approximately 20 percent of employees either currently use their own personally supplied device or believe one would be useful to them. Although a substantial majority does not currently see a use for these newer device categories, their appetite is likely to grow with familiarity and there is clearly opportunity now for employers to get ahead of the curve and determine which employees can benefit most from such tools. For smartphones and laptops, the number of employees who either use their own or believe one would be useful for their work rises to around 30 percent.

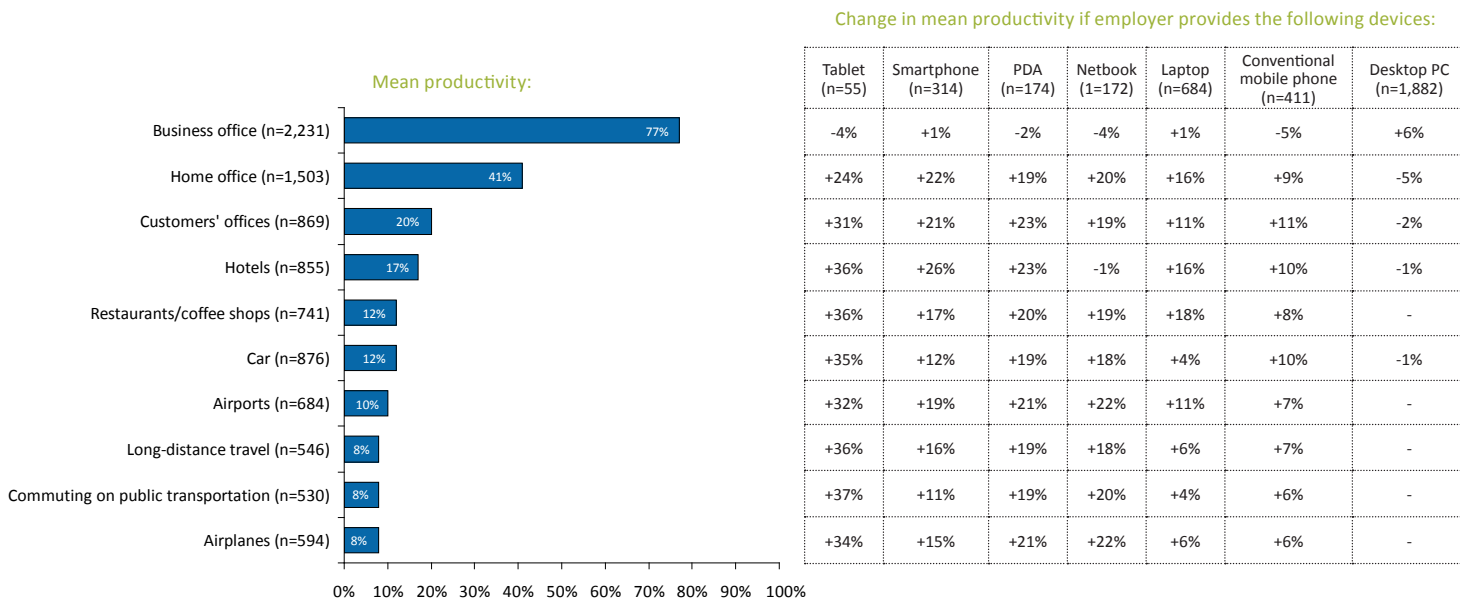
With 85 percent of employees believing flexible working conditions benefit their company, enterprises have a complex task on their hands to balance employee productivity and satisfaction. To ensure mobility works in employers' favor as the best rather than the worst of all possible solutions, employers need to equip the right employees—those who more regularly work in mobile and remote locations—with the right mobile tools. With 75 percent of employees believing technology makes them more productive now than two years ago, and with growing employee interest in using

emerging technologies for work, now is the time for employers to think holistically about their mobility strategies. Doing so produces a substantial uplift in productivity (see Exhibit 2).

With the most mobile form factors leading to substantial productivity improvements, employers should conduct regular evaluations of their work force mobilization strategy to ensure they match the right mobile device with the right employee segment. Currently, 31 percent of employees think their IT departments are not providing them with the right applications and tools to effectively collaborate with their colleagues. Having a growing proportion of your work force struggling to collaborate at work and consequently feeling isolated from their colleagues will have a hugely attritional impact on productivity. With Yankee Group data showing that several mobility initiatives are already high on the list of priorities for IT decision-makers (see the August 2009 Yankee Group Report, “[Consumerization Manifests Itself in Enterprise Mobility](#)”), employers need to make sure collaboration capabilities are a key driver when deciding the best mobile form factor with which to equip workers. As many as 24 percent of employees already feel isolated from their colleagues; enabling greater mobility could lead to further isolation if not deployed in the right way and to the right people.

Exhibit 2: The Right Mobile Technologies Increase Worker Productivity

Source: Yankee Group's Anywhere Enterprise: 2010 U.S. Enterprise Mobility/Empowered Employee Survey, Wave 1-2



Employers do, however, need to be careful not to go overboard. Although employees increasingly use mobile technologies for work, only a minority regard them as actually critical for their productivity (e.g., just 25 percent say either mobile voice or mobile e-mail is most critical). Technology provisioning needs to be based on a careful segmentation of work force roles now and how they might evolve into the future.

Plan for Fragmentation

Not only do employers need to think holistically about whom to include in corporate mobility initiatives, they also need to plan for fragmentation in deployment. If they don't already, employers need to make sure they have a plan for managing a mixed pool of corporate- and employee-supplied devices because there is likely to be a disconnect between what is officially sanctioned technology and what employees seek out in the consumer realm.

This does not just come down to hardware; consumer applications are driving productivity, too. More than half (54 percent) of employees say they would be more productive if they had access to the applications and technologies they use in their personal life. Thirty-four percent say they actually install and use consumer apps for work purposes, with e-mail (18 percent), instant messaging (16 percent) and social networking (11 percent) the most frequently cited. This goes for employees of large companies as well as those of small ones. Familiarity, ease of use and the perception that consumer tools are more regularly updated than work ones are the factors most strongly driving adoption.

Currently, 40 percent of employees say their company has a policy preventing installation and usage of consumer apps, 31 percent say their company allows it, and 29 percent don't know what the company policy is. Anything other than a firm "no" from the

IT department will open the floodgates to mass consumer apps usage. For example, in those 31 percent of companies that allow consumer apps, usage increases fourfold.

Disallowing usage might, however, not be an option, as evidenced by the 7 percent of employees who say they install and use consumer applications despite their IT department prohibiting it. More worryingly, 6 percent say they use them even when they don't know whether their company's IT policy supports it or not. Whatever the policy, it must be clear and transparent to have any hope of being able to sensibly manage device and application usage.

Who Gets a Mobile Device Is One Thing; Who Pays for It Is Another

Our survey findings suggest meeting employees halfway on billing is good for business. For example, a corporate-sponsored mobile phone policy (where the employer and employee share control) rather than a corporate-liable policy delivers the highest end-user service satisfaction (see Exhibit 3 on the next page). Such a corporate-sponsored policy could require employees to purchase their device and contract upfront through an employer-arranged discount program and then have them expense a portion of the bill.

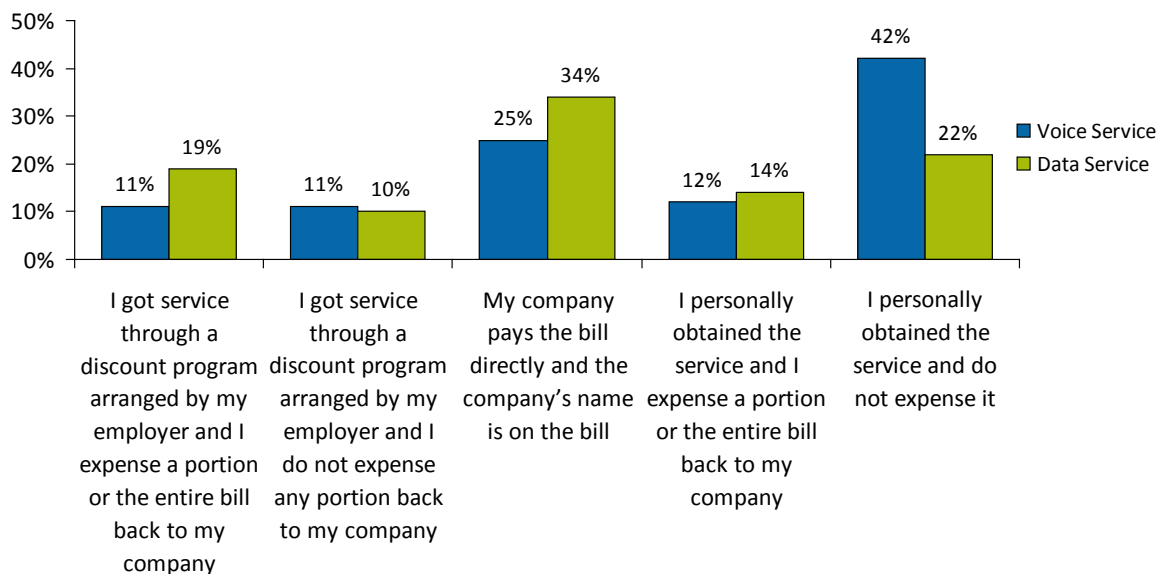
Conversely, our survey finds passing on all the cost to employees reduces satisfaction by 20 percent and increases dissatisfaction fourfold. With the distinction between work and personal tools becoming increasingly blurry, sharing control with employees over the initial expense and billing of mobile technologies can be a cost-effective way for companies to not only provision the right tools for their work force, but also reduce platform fragmentation in the corporate environment and increase productivity and satisfaction by giving users some—but not unlimited—choice over the tools they use.

Exhibit 3: Meeting Employees Halfway on Mobile Billing Is Good for Business

Source: Yankee Group's Anywhere Enterprise: 2010 U.S. Enterprise Mobility/Empowered Employee Survey, Wave 1-2

Satisfaction with quality of cellular network performance

	Voice	Data	Voice	Data	Voice	Data	Voice	Data	Voice	Data
Satisfied (8,9,10)	78%	76%	73%	71%	65%	66%	68%	65%	59%	57%
Neutral/Satisfied (6,7)	18%	19%	19%	20%	10%	22%	23%	24%	23%	25%
Neutral/Dissatisfied (4,5)	3%	3%	2%	2%	2%	9%	5%	7%	14%	15%
Dissatisfied (1,2,3)	1%	2%	6%	8%	3%	3%	4%	4%	4%	4%



Conclusions and Recommendations

The forces of consumerization are encroaching on the enterprise (see our July 2010 Yankee Group report “[Best Practices in Managing Consumerization](#),” our August 2009 report “[Consumerization Manifests Itself in Enterprise Mobility](#),” our January 2010 report “[Scaling Your Mobile Enterprise](#)” and our June 2010 report “[Learning to Love the Consumerized Enterprise](#)”), and the trend will surely continue. Approaches to enterprise mobility are often discussed in terms of enterprises wresting back control from unbridled consumerization. Trying to control mobility, however, is a contradiction in terms if ever there was one. It will likely only lead to further loss of control for employers as employees will inevitably gravitate toward those tools and technologies they are most familiar with and prefer using—whether it's the official policy to sanction it or not. The following recommendations will help employers formulate the right approach to ensuring that mobility becomes a strategic asset rather than a drain on productivity:

- **Think holistically about how core mobility should be to your organization.** When putting in place a mobility architecture, employers need to think expansively about whom to include, given the increasing amount of time the average work force spends in remote and mobile environments. The need for enterprise mobility has passed beyond executive segments, and middle management roles now are on the cusp of requiring mobility solutions as standard equipment, rather than just nice-to-haves.
- **Establish flexible policies to balance mobile technology investment, provisioning and billing between you and your employees.** This won't remove risk, but it will enable employers to have a clearer view of the tools being used by employees in the corporate environment. Consequently, it puts them in a better place to manage this risk. It is also a good sideways opportunity to engender stronger employee satisfaction.

- **IT departments should focus on becoming productivity-enablers, rather than policy enforcers.** Trying to control mobility is a contradiction in terms. IT departments need to become more progressive and proactive in their attitude toward mobility and look to segment their work forces to understand how best to match mobility solutions to employee role and function, rather than providing a controlled (aka limited) environment that employees will tend to avoid (or undermine).
- **IT departments need to articulate clear policies.** Although the flexible policies mentioned above offer greater transparency, stronger risk management and hopefully a more aligned device and application environment, employees will always reach for non-sanctioned tools. To manage a pool of corporate and personal technologies as effectively as possible, IT departments need to be clear in their policies about what is and what is not allowed.

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Headquarters