Provisioning A Flexible Workplace Pushes The Boundaries Of IT And Drives A Search For Outside Help

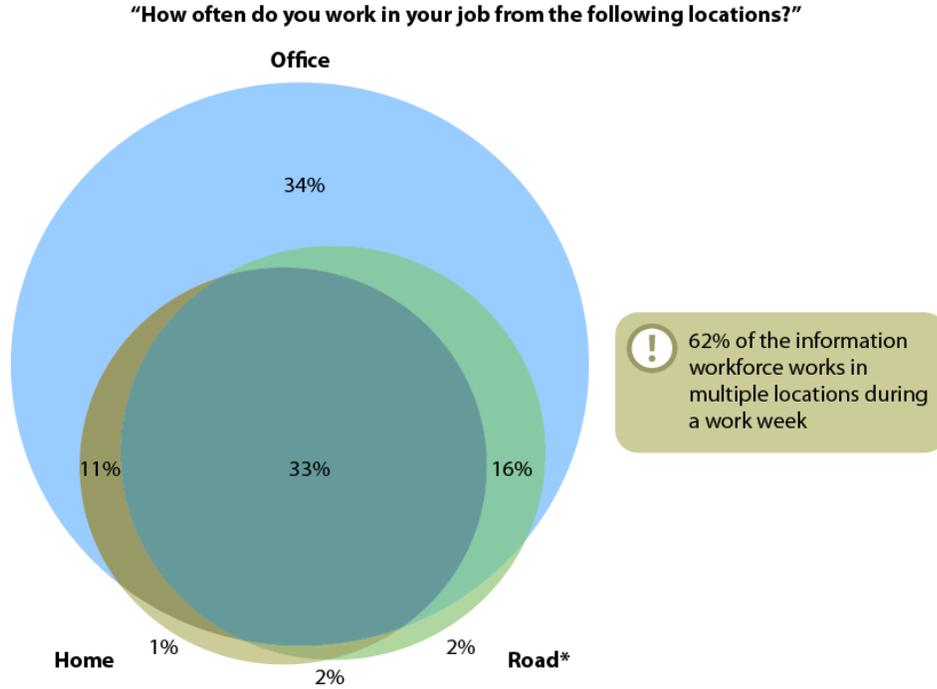*June 2012*

Annual Forrester Surveys Show Surging Demand For Workplace Flexibility

The workplace landscape is changing rapidly as people walk into the office with the expectations – and sometimes the tools – they carry from home. The requirements for flexibility rise even higher as employees work from home or in remote office and expect the same experience as being in the office. And those expectations are rising rapidly among all employees – not just in the executive hallways or engineering labs. In fact, Forrester's research into workplace technology adoption among information workers shows a steady progression year over year to the point where today:

- **56% of employees work outside the office regularly.** Telework is one driver of remote work, and in fact 25% of US information workers telework at least once a month while 62% works in multiple locations every week. But employees also work with clients, while traveling, and even while commuting, and that means employees need (anytime) access to apps and services from any location.

- **55% of employees use multiple devices – mobile and stationary – to get work done.** Smartphones and tablets are on the rise. Forty-two percent of global information workers use smartphones and 15% use tablets to access business data, applications and the corporate network. Couple this desire to remain in touch while on the go with the increasing use of home computers and network to get real work done, and you see how employee's daily technology quotient is on the rise.

- **Almost half of employees use advanced collaboration tools every day.** Email is universal, but companies are also finding an array of advanced collaboration tools – team sites for document exchange and team coordination; presence and video chat for instant conversations; Web conferencing for hosting ad hoc team meetings. Each of these tools as well as the voice and video communications that employees rely on must work for employees at their desk or anywhere they are trying to connect.

Figure 1
Most Of The Information Workforce Now Works Remotely

"How often do you work in your job from the following locations?"

Office

34%

11%   33%   16%

62% of the information workforce works in multiple locations during a work week

1%   2%
Home   Road*
       2%

Base: 5,102 North American and European business technology users who work from a location at least once a month or less

*Note: Represents respondents who work from a client site, while traveling/commuting, and/or in some other public work setting at least once per month or less

Source: Forrester Forrsights Workforce Employee Survey, Q1 2011

Figure 2
Employees Work On Multiple Devices
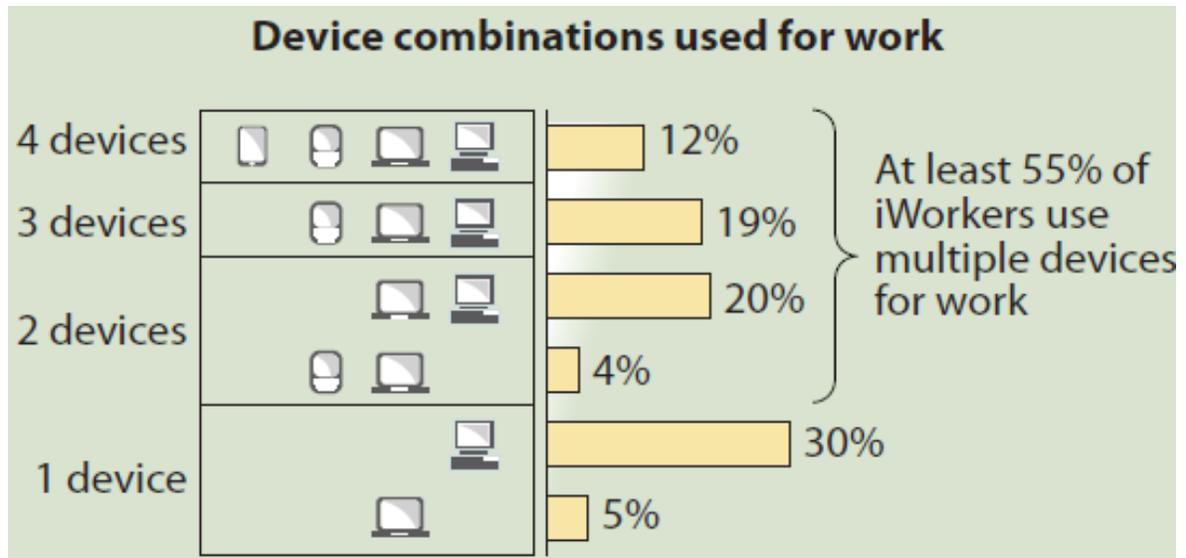
Base: 9,912 information workers

Source: Forrester Forrsights Workforce Employee Survey, Q4 2011

New Computing Platforms and Applications Compound Complexity and Threaten Security

When the average employee's toolkit was comprised mostly of Windows operating system on standard desktop or laptop hardware and email-based collaboration, IT had control over complexity, refresh and upgrade cycles and could implement infrastructure-wide security at the network layer. Those days are over. Today:

- **IT supports five different operating systems, including four mobile systems.** Forrester has found that there is an array of operating systems being used and the list of operating systems grows to five and counting.[1] This means that the skillsets and tools needed to maintain service levels and security policy continues to multiply in proportion with platform diversity.
- **Business and collaboration apps run on mobile devices.** Employees seek to run all major applications on their smartphones and tablets (see Figure 3). While email is the universal application, the long tail of mobile apps includes browsers, collaboration, and access to systems of record, such as the company intranet, sales force automation tools, and line of business applications longer term.
- **The proliferation of BYOD programs means many devices and apps lay outside of direct IT control.** Already, 48% of the smartphones and 67% of the tablets used for work are chosen by employees without regard for IT support. Add applications for file synchronization across devices, SaaS solutions for partner collaboration, and the challenges increase.
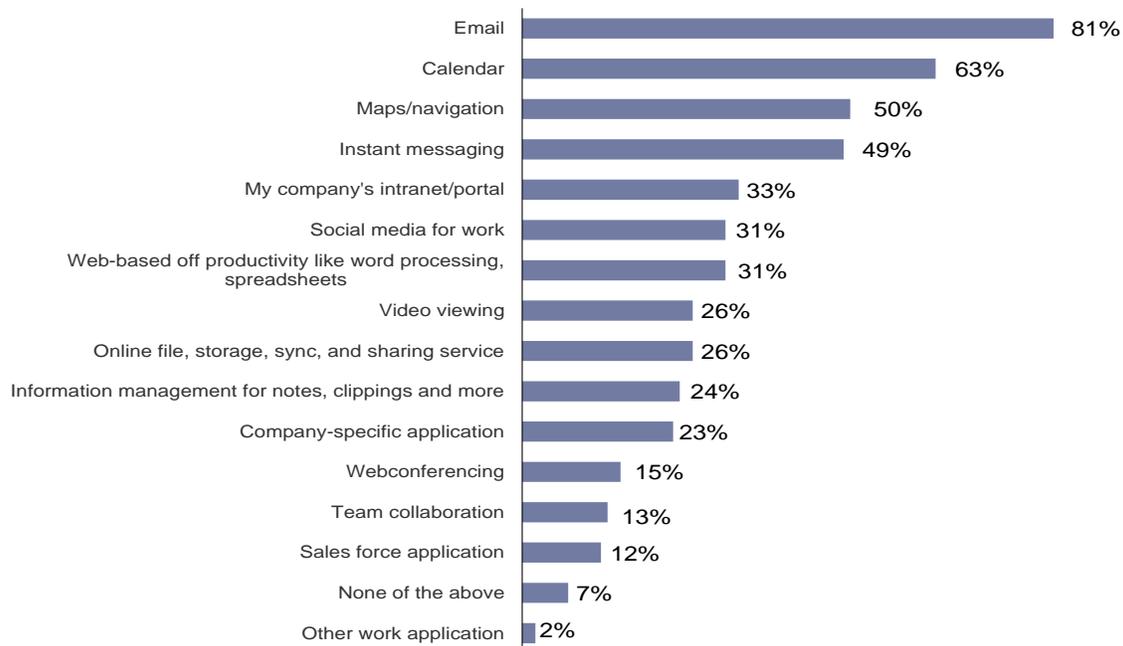
It's quite clear that a flexible workplace – one in which workers have more freedom to choose the devices, applications and work styles that allow them to work most effectively - comes with a host of opportunities

for transformative investments but also a litany of support and provisioning challenges and a host of security concerns for IT to manage.

Figure 3
Communications and Collaboration Use Cases Are Top Mobile Needs

Which applications do you use on your [MOBILEDEVICES]? (Select all that apply)

Application	%
Email	81%
Calendar	63%
Maps/navigation	50%
Instant messaging	49%
My company's intranet/portal	33%
Social media for work	31%
Web-based off productivity like word processing, spreadsheets	31%
Video viewing	26%
Online file, storage, sync, and sharing service	26%
Information management for notes, clippings and more	24%
Company-specific application	23%
Webconferencing	15%
Team collaboration	13%
Sales force application	12%
None of the above	7%
Other work application	2%

Base: 4,452 respondents
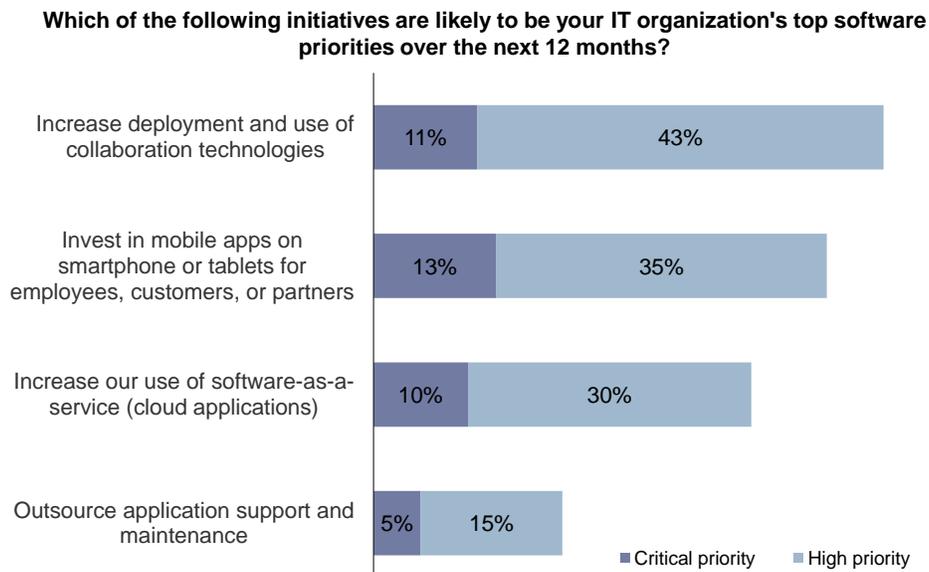Source: Forrester US Workforce Employee Survey, Q42011

Collaboration and Mobility Top the Priority List, But Security is the Greatest Concern

IT decision-makers are pushing forward with solutions to support a more flexible workplace (see Figure 4 and Figure 5). They focus on tools that empower employees to be more productive and invest in new architectures to support those tools and applications. Forrester also finds, however, that many of these investments are being made only after the demand has threatened to overtake the IT organization's capacity, rather than strategically in advance:

- **54% of IT decision-makers have prioritized collaboration.** As we've seen, employees that work flexibly and remotely need collaboration tools and support. IT has responded to this demand with a focus on better collaboration tools like team sites, unified communications, video conferencing, and social collaboration tools.
- **48% have made mobile apps a priority.** Similarly, smartphones and especially tablets have become a critical part of the work day, and IT groups have made mobile apps a focus of investment. Porting all the desktop apps isn't practical, so firms are putting common business and collaboration applications at the top of the queue.

- **40% are putting SaaS solutions on the priority list.** Two in five firms are willing to put critical business applications into the cloud, partly to support the needs of remote and mobile workers. SaaS is an inherently good architecture for the "last mile" wireless network and multi-platform requires of mobile devices.
- **57% worry about securing apps and content on mobile devices.** The list of security remediation tools and strategies is growing every month. IT is starting to respond to their concerns by investing in third-party device management and mobile app "container" approaches that secure the end-to-end connection between the app and the database.

Figure 4

Collaboration and Mobility Are the Top Software Priorities

Which of the following initiatives are likely to be your IT organization's top software priorities over the next 12 months?

| Initiative	Critical priority	High priority
Increase deployment and use of collaboration technologies	11%	43%
Invest in mobile apps on smartphone or tablets for employees, customers, or partners	13%	35%
Increase our use of software-as-a-service (cloud applications)	10%	30%
Outsource application support and maintenance	5%	15%

■ Critical priority   ■ High priority

Base: 2,438 Global IT Decision-Makers

Source: Forrsights Software Survey, Q4 2011

Figure 5

Improving Security is the Top Mobile Priority

What are your firm's top mobile priorities during the next 12 months? (Select all that apply)
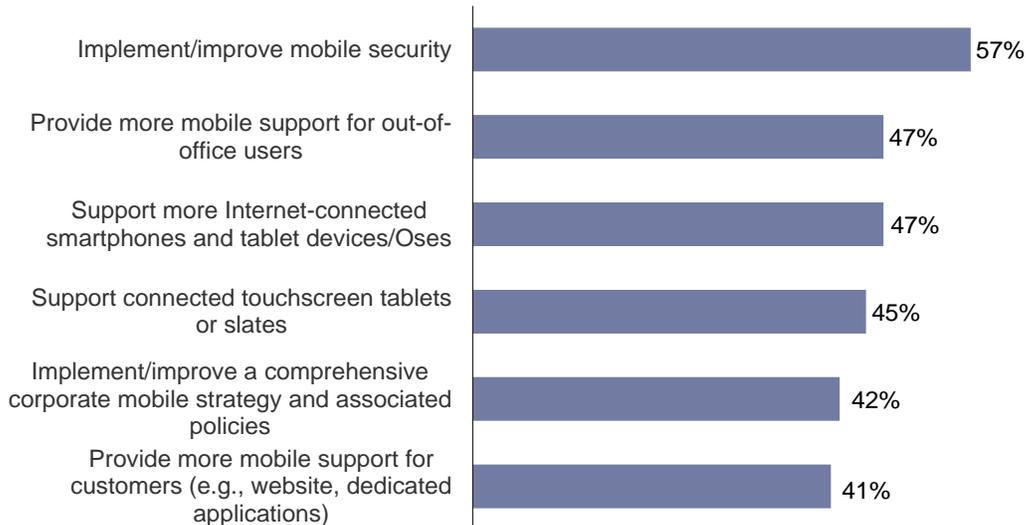
Base: 1,535 information workers

Combined answer choices "High" and "Critical" priority

Source: Forrester Forrsights N&T Survey, Q1 2012

IT Organizations are Responding With Flexible Workplace Services …

IT is doing more than just prioritizing mobile and collaboration and SaaS – they are making big bets on solutions that have the potential to transform how business operates (see Figure 6). Mobility, employee self-service, and social business are all important, but all are usurped by the need for an integrated strategy to support flexible work. This means being more directly engaged with workers and business stakeholders, and delivering new services proactively as part of an IT strategic plan. These steps are critical for IT to shift from being seen as a cost center and liability, to being a strategic partner for competitive advantage. To support those initiatives, IT has ramped up its service desk investments and is making investments in (see Figure 7):

- **Client virtualization to provide a secure, managed environment**. Client virtualization technologies (both hosted and local) properly matched to work styles, provide an effective means of accelerating the BYOC program by allowing IT to provide a standardized, well-managed desktop environment on employee-owned computers, but they can also take legacy applications off the critical path for upgrades, and give workers more options.
- **Unified communications improve collaboration and offer flexibility.** Unified Communications technologies close the gaps between voice, video and data, and allow people to work more effectively outside the office. They also make collaboration easier and more effective. Firms are deploying new systems that integrate voice and video, but also allow remote workers to participate as though they are in the office.

- **Support for more mobile device platforms.** Mobile devices, including smartphones and tablets, are adding a wide range of apps and more flexible information access for workers on the go or during off hours, but they also pose a risk for company information and require support. Firms are investing in mobile device management and security tools to help them automate the configuration of the devices to work with company services, but also ensure that if the device is lost or stolen, the information is secure.
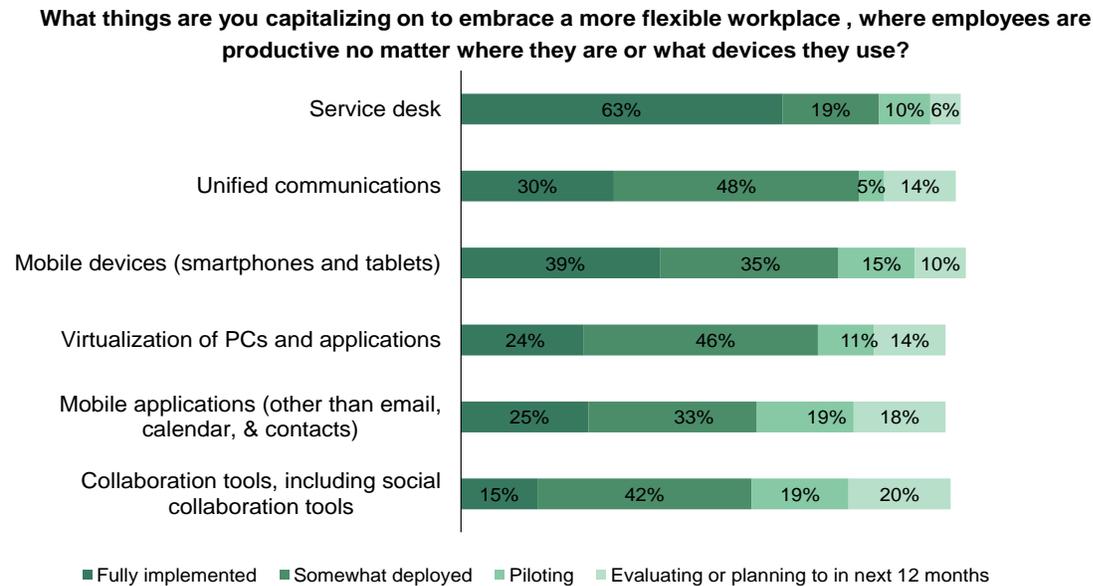
Figure 6

Firms See Alignment With Business Priorities And Mobility As Transformational

To what extent are the following workplace initiatives transformational in delivering business value and growth?

Initiative	Transformational	Somewhat transformational
Developing an integrated business/workplace strategy	31%	51%
Enabling a mobile/remote workforce	41%	39%
Making greater use of employee self service	25%	49%
Becoming a social business through better collaboration tools	19%	50%
Allowing employees to bring or buy their own device	16%	28%

■ Transformational ■ Somewhat transformational

Base: 80 Global IT decision makers

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, May 2012

Figure 7

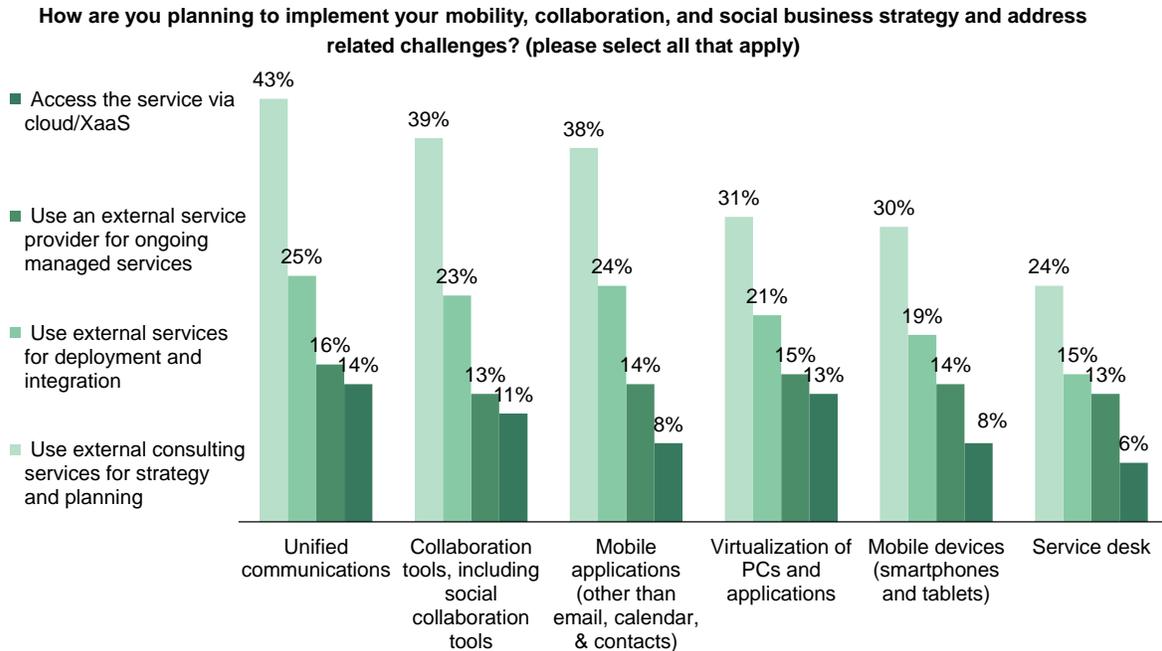Collaboration Tools And Mobile Applications Are Top Short-Term Investments

What things are you capitalizing on to embrace a more flexible workplace , where employees are productive no matter where they are or what devices they use?

	Fully implemented	Somewhat deployed	Piloting	Evaluating or planning to in next 12 months
Service desk	63%	19%	10%	6%
Unified communications	30%	48%	5%	14%
Mobile devices (smartphones and tablets)	39%	35%	15%	10%
Virtualization of PCs and applications	24%	46%	11%	14%
Mobile applications (other than email, calendar, & contacts)	25%	33%	19%	18%
Collaboration tools, including social collaboration tools	15%	42%	19%	20%

■ Fully implemented ■ Somewhat deployed ■ Piloting ■ Evaluating or planning to in next 12 months

Base: 80 Global IT decision makers

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, May 2012

… And Turning To External Provider Usage For Help

To help with the flexible workplace transformation, IT is doing things on-premise and with existing resources. But it is also turning to a growing array of suppliers that have the capacity, tools, and expertise to accelerate the deployment and assist or manage the operations of an ongoing effort (see Figure 8).

- **Companies are looking for help in every transformational initiative.** Across the board – for unified communications, collaboration, mobility, client virtualization, and service desk – IT decision makers are seeking outside assistance. The need is highest with UC, but almost a quarter of respondents signal the need for outside help for service desk. The logic is clear: in order to achieve the transformation benefits quickly and efficiently, many companies will seek outside help.
- **Companies are looking for expertise, deployment services, and managed services.** Strategy consulting leads the list of outside support, but across the board almost one in four firms will use a third party for deployment and integration services. And many are considering managed service or cloud providers for ongoing operations and management.
- **Cloud-hosted delivery models are the first choice for a wider range of applications.** Workplace fflexibility will depend heavily on cloud-hosted delivery models. Convenience, reliability, cost and time-to-value advantages are compelling, and economies of scale of cloud providers will make it increasingly difficult for internal IT to justify providing competing services in-house.

Figure 8

The Majority Of Firms Are Planning To Use External Consulting Services For Strategy And Planning

How are you planning to implement your mobility, collaboration, and social business strategy and address related challenges? (please select all that apply)

- Access the service via cloud/XaaS
- Use an external service provider for ongoing managed services
- Use external services for deployment and integration
- Use external consulting services for strategy and planning

Base: 80 Global IT decision makers

Source: A commissioned study conducted by Forrester Consulting on behalf of IBM, May 2012

What it Means: IT Organizations Can Create Value Faster Through Clever Sourcing of Technology and Resources

To compete, IT organizations must look to flexible workforce computing technologies, security models and tools, and also to best practices and skills that may not have or easily build and support internally. The economies of scale of cloud-based solutions and service providers will put pressure on IT to either compete or outsource, as less and less of what employees use in their jobs is provided by the company's IT organization. This will force a re-invention of the IT supply chain and cast IT as a technology mentor and service broker for the business, rather than builder and maintainer of systems.

- **Rapid Support for New Technologies and Increased Workplace Flexibility Often Stand At Odds With Information Security.** It's not an either or situation, so firms must find new ways to promote freedom and flexibility. Client virtualization, new network security models such as Zero Trust, and a new generation of management software are all available to help firms make the changes needed.
- **Firms cannot easily deliver a flexible workplace without developing skills and tools.** Offering employees more freedom is an uncomfortable proposition for IT professionals charged with support and security. They will need outside advice and skills to rapidly assimilate entirely new technologies and service providers into their operations.
- **They Face the Choice of Building the Capabilities They Need Internally Over Time, or Getting Faster Help From Outside.** It's the classic build vs. buy scenario, but with an important difference: The evolution of cloud and SaaS-based technologies has brought new levels of functional richness,

platform support and economies of scale that are very difficult to compete with as an IT organization with limited funding. And, the new skills required to secure an increasingly mobile workforce in a landscape of advanced threats will come from specialists.

- **Success Requires Re-Thinking the IT Supply Chain.** The shift of IT's role away from building and administering systems in-house, toward a role of increased brokering IT services and technologies from outside, combined with radically increased complexity and pace of change, will force a fundamental change in the way IT organizations operate. The delivery of services to the business will become analogous to manufacturing supply chains, where components and capabilities are sourced just-in-time from the most optimal providers, and lean methods are applied to internal operations.

Methodology

This Technology Adoption Profile was commissioned by IBM. To create this profile, Forrester leveraged its Forrsights Workforce Employee Survey, Q4 2011, Forrsights Software Survey, Q4 2011, and Forrsights Networks and Telecommunications Survey, Q1 2011. Forrester Consulting supplemented this data with custom survey questions asked of 80 Global IT decision-makers who are responsible for the flexible workplace efforts and strategies at enterprise organizations in the US, UK, and India. Survey questions were related to transformational workplace initiatives to deliver value and growth, current strategies, and the implementation of mobility, collaboration, and social business to address current challenges. The auxiliary survey was conducted in May 2012. For more information on Forrester's data panel and Tech Industry Consulting services, visit www.forrester.com.

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[1] For additional information, see Forrester Forrsights, N&T Survey, Q1 2011.