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# Always On, Always Connected. Keeping Up With Mobility

The Accenture CIO Mobility Survey 2012  
Executive Summary

  
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## Keeping Up With Mobility

Even while CIOs target mobility as a priority, they face competitive and development challenges. What's the best way to help develop a cogent strategy and stay ahead of the curve?

If the intense popularity of and focus on all things mobile—smartphones, tablets, connected devices, and mobile apps—seems familiar, it's because the 1990s Internet mania is repeating itself. Think about it—suddenly a new technology swept in, threatening and promising to change the way people worked and lived. It became an instant priority for IT, but its multiple facets weren't so easily nor quickly mastered.

Companies spent money creating web sites akin to "brochureware," while savvy companies realized that, with some careful back-end investment, the Internet could

not only offer data access to employees, partners, and suppliers, but also represent an unprecedented transactional opportunity via e-commerce and other channels. The latter companies thrived while the others floundered.

According to two recent surveys by Accenture Research, history is indeed repeating itself. Mobile devices bring an astonishing number of capabilities. But while companies scramble to develop a mobile strategy, it's clear confusion still reigns over how to accommodate divergent employee and customer needs, especially with the

fragmentation of the mobile device market and widespread concerns about security, costs, and connectivity.

As with the Internet, CIOs must do three things: 1. Understand where in their organization developers are creating mobility applications; 2. Discern how to quickly integrate them into a cohesive strategy; and then 3. Use that strategy as a foundation for competitive advantage.

# Mobility Is Both a Priority and a Challenge

To gauge the perceptions of mobility among IT professionals, Accenture Research surveyed several hundred CIOs and several thousand application developers in North America, Europe, Asia, and South America in January 2012. The results were startling. When asked to tally their priorities, 78 percent of CIOs placed mobility in their top five.

But the survey results also revealed some intriguing anomalies. When Accenture asked CIOs about their priorities for the coming year, the answers diverged based on geography. Far more CIOs in emerging markets focus on mobility compared to those in established markets, in part perhaps of their ability to capitalize on greenfield opportunities. That means emerging markets avoid integrating with large back-end legacy systems, and may not even have deployed desktop applications.

Other concerns complicate the rush toward mobility. No matter where CIOs reside around the world, cost and security led the list of their concerns. Among CIOs, 50 percent cited security, 43 percent cited budgetary issues, and 26 percent identified interoperability with current systems and a lack of understanding about the benefits of mobility. When application developers were asked to name the smartphone platform with the best security, none received an overwhelming endorsement: A little more than half thought Apple's iOS operating system had the best, while approximately one-quarter cited Google's Android operating system.

The results also clearly highlighted fragmentation of the mobile device market. This manifests itself in the vast number of mobile platforms and devices, as well as the question of whether to focus on consumer (B2C) or employee (B2B) applications. App developers rated fragmentation among Android™ and Blackberry® devices as

particularly difficult to manage, and both scored lower on their monetization potential than the Apple iPhone and iPad.

Fragmentation complicates companies' abilities to accommodate one of the strongest trends in mobility: "consumerization" or "bring your own device" (BYOD). Helping employees to run applications on any mobile device, IT risks having its resources diluted further. Concurrently, the market remains in flux with BlackBerry® devices that were once highly favored now suffering from "low" or "very low" engagement scores.

Another potential burden on resources: the decision whether to focus on employee or consumer applications. Companies inherently understand that offering an app to consumers specific to help them increase customer interactivity and intimacy. But the same divergent number of devices on the employee side applies to the consumer side, complicating the issue of native versus cross-platform development.

The issue of consumer applications also relates monetization, the ability to confirm that results of mobile development relate to quantifiable revenue streams. Forty-two percent of all CIOs want to help improve field service or customer service delivery with instant data access, capture, and processing.

On the consumer side, another 40 percent want to help drive revenue through customer engagement.

One might think that all these obstacles together constitute a Gordian knot for mobility, one that's not easily untied or even sliced. Nothing could be further from the truth. Even as companies wrangled with the challenges of the web fifteen years ago, they grasped its inherent value. The same applies to mobility.

No matter what the obstacles, CIOs report a strong commitment to mobile technology. When asked which capabilities they were focusing on, the trend was clear: process improvements. CIOs cited the ability to streamline operations through the ability to track orders, assets or inventory from anywhere; 37 percent had completed such efforts, while another 37 percent were already executing them. Close behind that was the ability to help accelerate the sales cycle with improved access to back-end systems and data quality for the sales force.

An even higher percentage of CIOs (43 percent) were in the middle of efforts to empower communication and collaboration among employees no matter where they were. More than half (53 percent) of CIOs reported being in the middle of projects to help improve field and customer service activities.

# Tackling the Challenges Through a Cohesive Strategy

Given that mobility – like the Internet before it – is equally confusing and compelling, IT executives need to craft a strategy for conquering it. Creating such a strategy means, first, acknowledging the shift from applications containing data, logic and presentation tiers to one in which services exchange information. A strategy will also help keep the obstacles from overwhelming multiple internal, though uncoordinated, efforts. What goes into a mobile strategy?

Accenture sees three key elements: technology, business requirements and management.

**Technology.** This element helps span everything from platform choice to development tools. Are you going to internally standardize on one device, or encourage the BYOD concept? This impacts your choice of development tools, which range from native to cross-platform or hybrid approaches. It will also affect your deployment choices, such as whether you will make applications available through external app stores or internal downloads.

**Business Requirements.** This element encompasses identifying where mobile solutions are most important within your company, so you can prioritize development efforts. Given the strong commitment that CIOs in emerging markets have toward mobile solutions, it may behoove other CIOs to make mobile solutions available to employees in other countries, and verify that they are localized properly. At the same time, companies may choose to emphasize other key areas highlighted by the survey results: sales, internal collaboration, or applications serving customer service.

**Management.** Given the degree with which the mobility market shifts, it's important that CIOs maintain strong strategic oversight to tweak it when necessary as conditions shift.

It won't be easy to establish your strategy, because such an effort requires identifying future projects and identifying current projects and confirming they are nudged toward your ultimate goals.

To hone their strategies, CIOs must embark on a three-step process.

**Step one: Discovery.** Identify current projects as well as future goals; remember that business units may be tackling applications on their own.

**Step two: Acceleration.** Having identified projects you want to pursue and the underlying technologies, promote acceleration by standardizing your efforts as much as possible. Use common code—aka an “application factory”—for basic elements spanning people, process, and tools. These factories help reduce overlap and increase developer efficiency. Establishing common interface elements for employees may shorten training time and increase productivity.

**Step three: Innovation.** Once you've created a strong foundation for internal success, you can start looking at other capabilities to make your mobile applications more competitively differentiated. How can you target those key areas and create even better tools for helping reduce sales cycles or gathering customer insights at the moment they're making purchase decisions? Those kinds of insights are closer to reality than ever before, but only if you understand your strategic goals.

To seek high performance in the mobility market, the most important thing to remember is that you're still aiming at a moving target. Remember Internet time? You're now living on mobile time. Devices continue to evolve, as do application development tools. Just as you had to do

in Internet time, you must focus on what aspects of mobility serve your business requirements most, and recalibrate them periodically. While you can easily refresh some strategies every year or two, for now you must reconsider your mobile strategy every six to 12 months to verify that you're still placing your bets on the right trends.



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## Methodology

In January 2012, Accenture conducted an online survey with 240 IT professionals (directors of IT, CIOs, CTOs, Directors of Technologies and Chief Mobility Officers) across 23 industries in 12 countries: Australia, Brazil, China, France, Germany, India, Italy, Japan, Mexico, Spain, United Kingdom, and United States. Half work for companies that generate between USD\$500 million and USD\$1 billion in annual revenues; the other half between USD\$1 billion and USD\$5 billion. The January research also included an online survey of nearly 4,000 mobility application developers based in Africa, Asia/Pacific, Europe, and North America, who create applications, products and services for employees and enterprises, as well as consumers.

## About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with more than 244,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US\$25.5 billion for the fiscal year ended Aug. 31, 2011. Its home page is [www.accenture.com](http://www.accenture.com).

## About Accenture Mobility Services

Accenture is focused on enabling its clients to achieve breakthrough growth throughout the rapidly changing mobile ecosystem. The Accenture Mobility Services group offers five mobility services including consulting, software services—applications, software services—devices and platforms, managed services, and business integration services. These are designed to help organizations embrace business to employee (B2E), business to consumer (B2C), business to business (B2B) and machine to machine (M2M) business opportunities. Accenture offers mobility and embedded software services across a wide range of industries, devices and platforms, including Symbian, Microsoft® Windows® Mobile, Windows® Phone, Android™, BlackBerry®, iPhone®, Java™, Linux, and MeeGo™.